

PROFESSIONAL SKILLS



STUDENT GUIDE



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INTRODUCTION

Developing professional skills and gaining real-world experience are central to the ACA, preparing you for success in today's business environment.

Professional skills will equip you with the ability to handle the variety of different situations you will encounter throughout your career. The ACA features 25 professional skills split across five key competency areas. A three-stage proficiency model will help you to track your development and showcase your unique skills portfolio.

You will be supported by your employer to develop professional skills and development conversations will be part of your regular six-monthly review meetings. Development is unique to everyone. Your employer should help nurture and celebrate this, while identifying opportunities for further development.

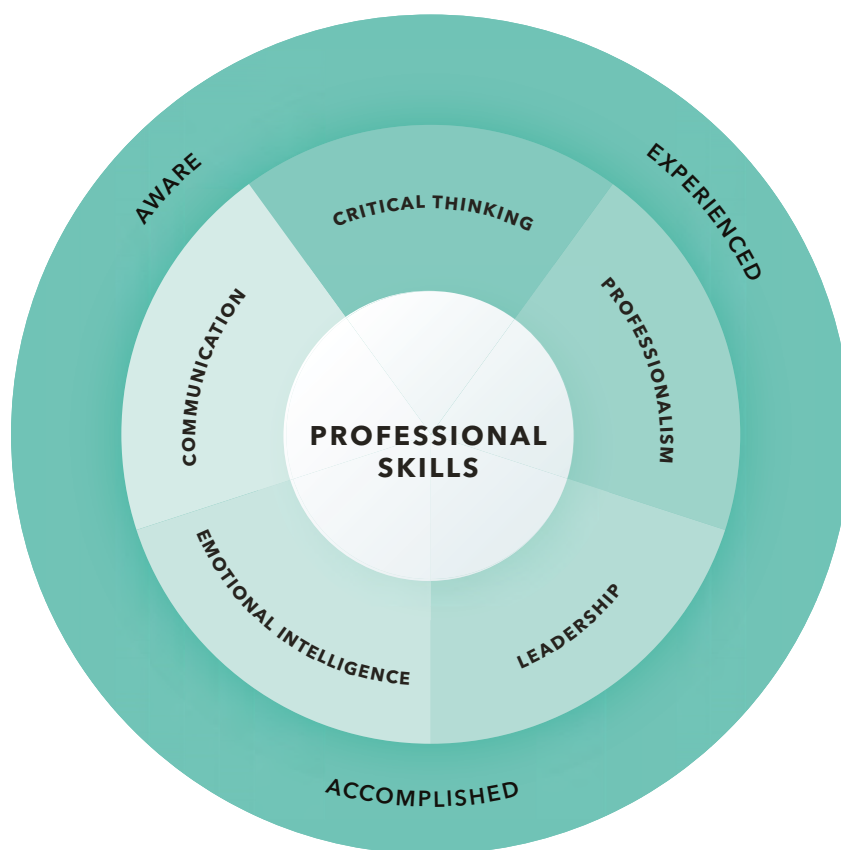
Use this guide to help assess your progress in each skill and assist your development conversations with your employer.

The ACA professional skills have been designed to:

- Drive career longevity with a focus on key transferable skills such as communication, critical thinking and leadership.
- Celebrate diversity by creating personalised views of your professional development.
- Encourage lifelong learning and development by helping both you and your employer identify development opportunities and encourage access to relevant resources.
- Complement apprenticeships by improving alignment with apprenticeship standards and remove duplication.

PROFESSIONAL SKILLS

PROFESSIONAL SKILLS AND EXPERIENCE ➤ PROFESSIONAL SKILLS

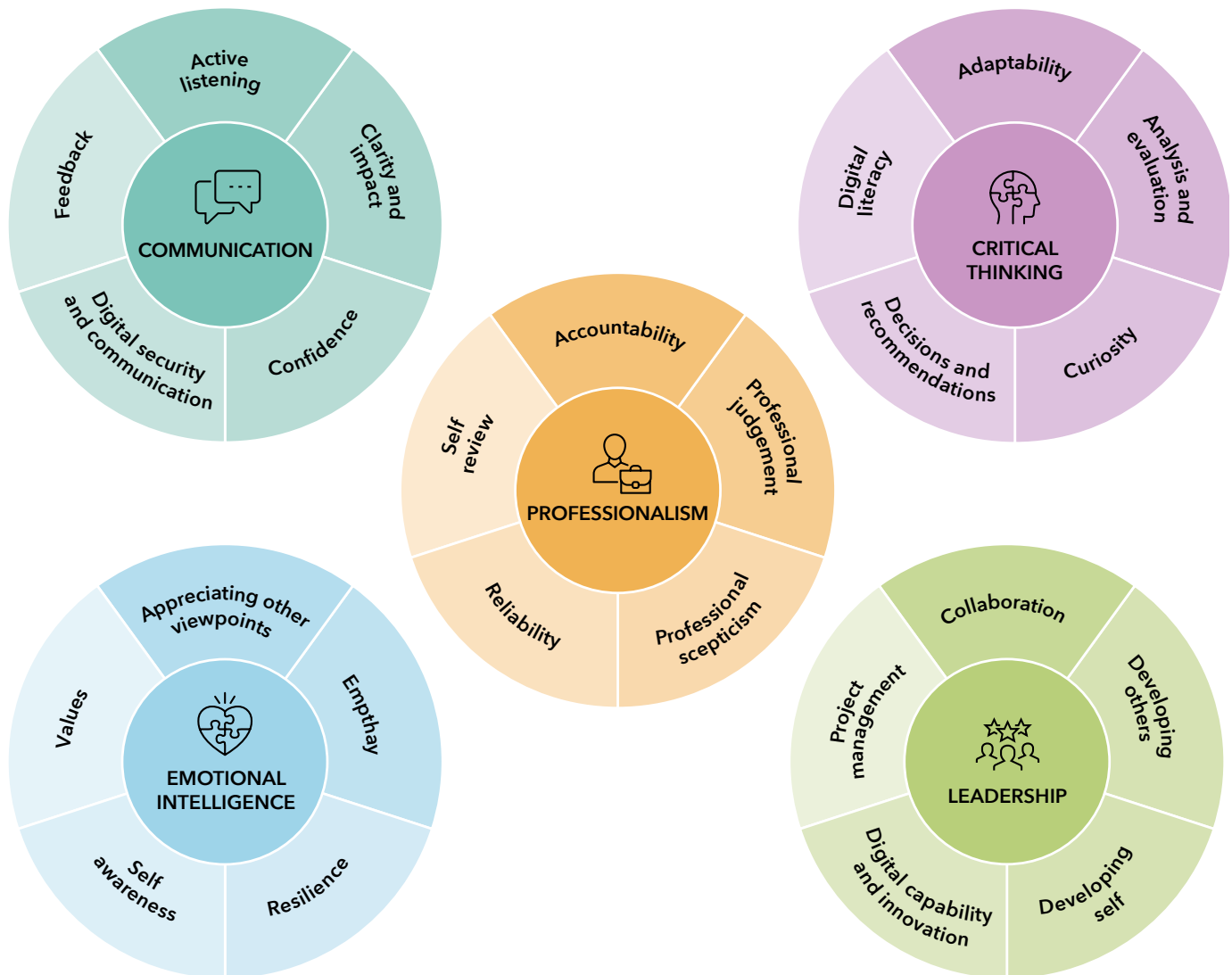


Professional skills are the behaviours, attributes and personal qualities that enable individuals to effectively interact, collaborate and contribute in the workplace. These skills are critical for building relationships, adapting to change and solving problems.

Developing professional skills in the workplace helps to improve communication and collaboration while fostering leadership and decision-making abilities. In addition, they will help you to manage your time and priorities effectively, build resilience and hence contribute to a positive workplace culture.

Professional skills are deeply interconnected, and their true power lies in how they work together in real-life situations. Developing one skill often strengthens others and applying multiple skills in combination leads to more effective and professional behaviour. Professional skills do not exist in isolation, they support and enhance one another.

THE PROFESSIONAL SKILLS



Your employer should provide you with opportunities to explore and gain experience in different areas of work, to enable you to develop these key professional skills. As part of this development journey there should be regular progress conversations, at least every six months, where you will assess your progress together. This toolkit will assist you in making your own assessment of your progress in each skill and give you examples of how your employer can help you to develop further.

This competency framework is structured around the core professional skills and focuses on continual development and highlighting the importance of interaction between skills.

Take collaboration for example, being the ability to work effectively with others towards a shared goal. This uses active listening, clarity in communication and adaptability. By actively listening you are giving your full attention, building trust and respect. You can clarify by asking the right questions to reduce confusion, value different opinions and perspectives, and show support for different options. Successful collaboration is built on listening actively, communicating clearly and staying flexible.

PROFICIENCY LEVELS

This competency framework recognises individuality and celebrates diversity, with minimum thresholds set to ensure the expected standard of a qualified ACA is met, signalling professional maturity. On submission to ICAEW membership there is an expectation that you are moving away from being directed to directing others, are transitioning from doing tasks to managing outcomes and rather than providing data you can deliver insights and provide strategic value.

There are three proficiency levels: aware, experienced and accomplished.

Flexibility on progression and coverage of skills provides a unique learning journey. However, you are expected to build a strong foundation, being “experienced” across all professional skills, highlighting the importance of a learning mindset and professional behaviour that aligns with ICAEW’s Code of Ethics.

You will have a clear idea about your strengths and development areas. Use this toolkit to give you ideas for further development, examples of workplace experience and look to Specialised Learning resources to help you develop further before your next review.

As part of your six-monthly review meetings you will have opportunities to reflect on your progress and experience with your employer. You will also think about areas for you to focus on over the following six-month period – setting out a development pathway. It will also allow an integrated conversation on how Specialised Learning can be used to support and develop further. This forms an iterative process: learn, practise, reflect, discuss and look forward before starting the cycle again. This approach allows time for self-reflection and looking ahead to what the next six months should bring while promoting progression, continual development and lifelong learning, linking seamlessly with Continuing Professional Development as you become a member.

Proficiency Level	Description	Requirement
Accomplished	<ul style="list-style-type: none"> Independent and intuitive demonstration; widespread experience, consistently delivering to a high standard; and provides support and development to others through mentoring. 	Students will need to be assessed as meeting the “Accomplished” threshold for at least five skills.
Experienced	<ul style="list-style-type: none"> Has an acceptable level of real and varied experience; recognises interconnectivity with other skills; and can work somewhat independently, with broad support and direction. 	Students will need to be assessed as meeting the “Experienced” threshold in all skills.
Aware	<ul style="list-style-type: none"> Has conceptual understanding of what the skill is and how it applies in a professional setting; can identify where others have demonstrated the skill and comment on your effectiveness; and is beginning to develop own experience, requiring close supervision and direction. 	Students will need to be assessed as meeting the “Aware” threshold in all skills.

EXPLORING EACH PROFESSIONAL SKILL

The following section looks at each of the five competency areas and the professional skills within it. Explaining what the skills are, how you can effectively assess each of the skills, what to think about for each proficiency level and finally providing practical development ideas in the workplace that you can discuss with your employer.



COMMUNICATION



CRITICAL THINKING



EMOTIONAL INTELLIGENCE



LEADERSHIP



PROFESSIONALISM



COMMUNICATION





COMMUNICATION TOOLKIT

Communication allows us to clearly convey information and understand others.

The five key skills of communication are:

ACTIVE LISTENING	CLARITY AND IMPACT	CONFIDENCE	DIGITAL SECURITY AND COMMUNICATION	FEEDBACK
<p>Being attuned to someone's thoughts and feelings as well as hearing what they are saying.</p> <p>It turns a conversation into an active, non-competitive, two-way interaction, building trust and understanding.</p> <p>It improves open communication.</p>	<p>The ability to deliver a message that is understood and resonates with the audience.</p> <p>Adapting your style to reflect your values and deliver confidently to inspire trust and credibility.</p> <p>Using simple language and being relevant.</p> <p>The ability to influence and persuade others.</p>	<p>Expressing your thoughts and ideas clearly and persuasively.</p> <p>Delivering messages in a decisive, assertive and enthusiastic manner.</p> <p>Being prepared and conveying positive body language.</p> <p>It encourages active listening and leads to trust.</p>	<p>Keeping digital information safe.</p> <p>Protecting data, devices and identity.</p> <p>Application of encryption, access controls and privacy settings.</p> <p>Connecting and communicating effectively in a digital space.</p>	<p>Being able to provide constructive feedback to others for personal development in a timely manner.</p> <p>Providing context and giving tangible and actionable examples/solutions.</p> <p>Accepting personal feedback in an open and positive way.</p>



The following pages show you how to assess yourself in each of these areas, as well as providing you with practical ideas on how to develop each skill in the workplace.



ACTIVE LISTENING

What is it?

- Demonstrating non-judgemental, uninterrupted attention.
- Understanding both what is being said (the words) and the underlying feelings (emotions).
- Being mindful of non-verbal language.
- Using supportive gestures to show that you are fully engaged.
- Clarifying understanding by asking questions.

Key attributes of the skill

- You value others by building trust and emotional engagement.
- Prevents misunderstandings.
- Enhances relationships and develops respect.
- You have more meaningful and open conversations.
- Leads you to make better decisions and provides resolution of differences.

You need to assess your own proficiency in the area of active listening – look at the questions below to give you an indication of where your proficiency level currently lies.

You will need to provide clear examples and evidence to your employer to support your self-assessment of your proficiency level.

Proficiency Level	Self-assessment questions
Accomplished	<ul style="list-style-type: none"> • Do you ask insightful and relevant questions in an empathetic way that encourages discussion and decision-making? • Do you encourage quieter team members to contribute and share your thoughts? • Do you take forward and act on what is being said?
Experienced	<ul style="list-style-type: none"> • Do you support junior colleagues by showing patience and acknowledging your concerns? • Do you openly acknowledge (nodding and direct eye contact) and validate colleagues' contributions in meetings? • Do you listen without interrupting, even during emotive discussions?
Aware	<ul style="list-style-type: none"> • Can you explain why active listening is important? • Do you ask questions if you have not fully understood what is being said? • Do you give your full attention during meetings and updates?



DEVELOPING ACTIVE LISTENING

Developing active listening, especially in connection with communication, involves creating a culture of paying attention, having empathy and understanding and providing meaningful responses. Here are some practical ways you can improve active listening and communication in your workplace:

1. CREATE AN ENVIRONMENT WHERE PEOPLE FEEL HEARD

Don't judge: Be curious and show interest in others – ask questions to find out more. Be respectful and show acceptance, even when you disagree. Be mindful of body language, from both sides.

A safe space: Think about giving your full attention, without distractions – consider leaving your phones and other devices on your desk during meetings. Show full engagement and provide empathetic responses to demonstrate understanding. This is particularly important in virtual meetings.

2. ADDITIONAL ROLE-RELEVANT OPPORTUNITIES

Summarising: Provide a verbal recap to ensure clear understanding of client, colleague and stakeholder expectations and responses to questions. Try to gather objective information.

Team working/projects: Make sure that you know what is required of you. Can you meet your manager's or client's expectations? Ensure that there are regular check-ins where everyone's voice is heard. Ensure that you respect others to build trust and gain a shared understanding. All members should feel that their viewpoints are considered.

3. BE MINDFUL OF TEAM BEHAVIOURS AND FEEDBACK

Understanding team needs: Take time to think about team dynamics and challenges through thoughtful listening and respectful dialogue, without pre-assumptions. Always try to use two-way dialogue to improve communication.

Actively respond to performance reviews and feedback:

Do you have space and time to share your thoughts without interrupting? Do you take on board constructive, thoughtful feedback, learn and improve, without being defensive?

4. SEEK OPPORTUNITIES TO PRACTISE

Shadow colleagues: Ask to shadow colleagues and senior management to understand the importance of both the spoken and unspoken message. Look at being in the moment, attentiveness, focus, showing empathy and using both verbal and non-verbal acknowledgement.

Ask for opportunities to lead meetings: Try to be more engaged and look to adapt to alternative communication styles. Ask whether responsibility to take notes/minutes and summarise what has been said can be rotated around the team. Be interactive and engaged during meetings.

5. IDENTIFY KEY POINTS AND PRIORITIES

Explain to others: Look to present or clarify key responsibilities/tasks/deadlines to other team members. This encourages listening properly and consolidates your own understanding.

Focus on the most important information: "What are the requirements and key issues?" "What are the timelines?" Write down key dates and figures. Take notes. Clarify your own understanding.



Check out [Specialised Learning courses](#) to help you further develop in these skills



CLARITY AND IMPACT

What is it?

- Communicating in a way that is succinct and easy to understand.
- Delivering messages confidently, to make a difference.
- Expressing thoughts simply and powerfully.
- Leaving lasting impressions by adapting communication styles to suit the audience.
- Influencing others to take action through logical explanations.

Key attributes of the skill

- You offer thoughtful, relevant and persuasive input to support good decision-making.
- You help to avoid misunderstandings, confusion and possible conflict.
- You write well-structured, easy to follow reports, emails and other forms of communications.
- You can explain the same point in different ways to aid understanding and trust.
- There is no ambiguity and confusion.

You need to assess your own proficiency in the area of clarity and impact – look at the questions below to give you an indication of where your proficiency level currently lies.

You will need to provide clear examples and evidence to your employer to support your self-assessment of your proficiency level.

Proficiency Level	Self-assessment questions
Accomplished	<ul style="list-style-type: none"> • Do you deliver reports and updates to senior colleagues, focusing on the key areas to drive action? • Do you provide concise and meaningful feedback to junior colleagues, helping them to improve your own work? • Do you provide clear direction for junior team members, so that deadlines are met and errors minimised?
Experienced	<ul style="list-style-type: none"> • Can you provide examples showing how you were able to communicate information in different ways to adapt to the audience? • Do you have examples to show how you have presented data in a meaningful way to drive decisions? • Do you set out clear objectives to avoid ambiguity and recap on the what, why, how and what next?
Aware	<ul style="list-style-type: none"> • Can you explain why clarity and impact are important? • Can you express yourself in ways that others understand? • Do you present data in a simple and structured way?



DEVELOPING CLARITY AND IMPACT

Developing clarity and impact, especially in connection with communication, involves setting clear expectations and sharing information purposefully in a way that can be understood and acted upon. Here are some practical ways you can foster clarity, impact and communication in your workplace:

1. ADOPT STANDARDISED DOCUMENTATION

Use consistent templates: Use proforma templates and checklists for standard work, reports, letters etc. If these are not available, make a suggestion to make them available.

Structure and label files and papers: Implement logical naming and grouping of documents, electronically or otherwise. This avoids confusion and creates a well-ordered filing system (paper or electronic).

2. PROVIDE CONCISE AND MEANINGFUL SYNOPSES

Highlight salient points: Be able to provide brief summaries of key points, rather than these being lost in unnecessary detail. This helps others to make prompt, informed decisions and avoids the problem of “Can’t see the wood for the trees”.

Understand who you are speaking to: while detail may be important for some, headlines will be more appropriate for others. Foster an appreciation of the audience – a focus on what matters to them and being able to adapt to suit.

3. LEAD BY EXAMPLE

Give clear direction: Do you and your colleagues know and understand exactly what is expected and who is responsible for what. Avoid any ambiguity and set out desired outcomes.

Be clear on timeframes: Establish key dates and deadlines upfront. Ensure these are transparent and achievable. Try to avoid vague terms such as “ASAP”.

4. AVOID BIAS

Use inclusive language: Ensure everyone feels acknowledged and valued by adopting neutral, respectful language to build trust and drive action.

Avoid assumptions: Be open in your approach, look for evidence, not speculation or personal opinions. This approach will build trust, credibility and aid effective decision-making.

5. MENTORSHIP AND FEEDBACK

Facilitate coaching: Ask senior team members for additional support through coaching. This will provide you with structured guidance and instruction in presenting information effectively and clearly, emphasising key messages and tailoring content/delivery. Getting ongoing, constructive direction will lead to a better end result.

Develop through review: “What have I done well?” “Where and how could I improve?” Ask questions and check your understanding.



Check out [Specialised Learning courses](#) to help you further develop in these skills



CONFIDENCE

What is it?

- Believing in your own abilities and value.
- Trusting your skills and judgement.
- Expressing yourself with calmness and conviction.
- Feeling and appearing self-assured and in control.
- The courage to act without hesitation.

Key attributes of the skill

- You communicate and express ideas clearly and assertively.
- You are willing and able to make decisions without constant validation.
- You take initiative in undertaking tasks without being asked.
- You remain calm when put on the spot or questioned.
- You step outside your comfort zone to take considered risks.

You need to assess your own proficiency in the area of confidence – look at the questions below to give you an indication of where your proficiency level currently lies.

You will need to provide clear examples and evidence to your employer to support your self-assessment of your proficiency level.

Proficiency Level	Self-assessment questions
Accomplished	<ul style="list-style-type: none"> • Do you consistently make informed decisions independently, using professional judgement and without needing ongoing reassurance? • Do you respectfully voice concerns over ethical issues, discrepancies and questionable decisions, irrespective of position? • Are you respected and trusted by colleagues and stakeholders through consistently demonstrating self-assured professionalism?
Experienced	<ul style="list-style-type: none"> • Can you explain information to colleagues and stakeholders clearly and persuasively? • Do you have examples where you have shown initiative without waiting for direction? • Do you stand by your decisions, even under pressure, and are willing to admit being wrong or uncertain?
Aware	<ul style="list-style-type: none"> • Can you explain why confidence is important? • Do you have examples where you have volunteered to explore new things? • Do you proactively speak up and ask questions?



DEVELOPING CONFIDENCE

Developing confidence, especially in connection with communication, involves creating a supportive environment where everyone feels trusted and heard, you are encouraged to speak up and able to participate openly and safely, without fear of judgement or criticism. Here are some practical ways you can foster confidence and communication in your workplace:

1. DEVELOP A GROWTH/LEARNING MINDSET

Continue to improve skills: Seek opportunities to gain knowledge and develop greater expertise, taking on new challenges. Openly ask questions and stay curious.

Track progress: Look at your progress, set achievable goals and regularly monitor progress. Set small milestones to boost your confidence and sustain motivation. "Look at what you have achieved." Avoid comparisons.

2. BUILD ON STRENGTHS

Identify positives: What do you do well? Promote these skills in the workplace and look for positive affirmations. Focus on these positive skills and apply them on a regular basis. This will start to build your self-belief by highlighting the areas you are naturally good at.

Encourage the sharing of expertise: Openly help others, this will naturally build your own confidence levels. Offer to mentor and support colleagues who are struggling.

3. CONTRIBUTE TO A RESPECTFUL, SAFE SPACE IN MEETINGS

Welcome all voices: Actively encourage participation from quieter members of the team in meetings, irrespective of their experience. Use positive reinforcement wherever possible, acknowledging contributions and promoting active listening. Be mindful of body language.

Rotate speaking opportunities: Encourage inclusion by using round-robins and updates. Give everyone a turn. Suggest that different team members lead and take ownership.

4. "HAVING A GO"

Start small: Ask for opportunities to try new and more complex tasks in low-risk situations. Starting with simple, non-critical tasks and building on this will show that it is OK to make mistakes as part of the learning process. True confidence includes humility.

Receiving support: Seek support and guidance along the way. Ask for someone to show you how to do something, or watch you do it to make sure you're doing it right, "hand-holding". This provides a safety net and will allow you to gain experience.

5. THINK ABOUT "HOW YOU SHOW UP"

Body language: Consider your body language, is it professional? Are you coming across as comfortable, self-assured and ready to participate? Steady eye-contact, minimal fidgeting, provide open gestures.

Be prepared: Make sure you are well prepared, this will reduce nerves and improve performance. Ask for an agenda in advance of meetings to manage expectations.



Check out [Specialised Learning courses](#) to help you further develop in these skills



DIGITAL SECURITY AND COMMUNICATION

What is it?

- Protecting digital assets and information.
- Integrity and robustness of digital systems.
- Safeguarding of information in an appropriate, efficient manner.
- Exchanging information using digital platforms.
- Responding swiftly and honestly to potential security issues.

Key attributes of the skill

- You understand the correct use of sensitive information.
- You ensure information remains confidential and secure.
- You use technology safely, professionally and thoughtfully.
- You exercise care when accessing work resources on personal devices.
- You use privacy screens and secured WiFi when working off-site.

You need to assess your own proficiency in the area of digital security and communication – look at the questions below to give you an indication of where your proficiency level currently lies.

You will need to provide clear examples and evidence to your employer to support your self-assessment of your proficiency level.

Proficiency Level	Self-assessment questions
Accomplished	<ul style="list-style-type: none"> • Do you consistently model best practice when using digital tools and implement appropriate sharing of sensitive information? • Do you troubleshoot tech issues and help others to do so in a calm and controlled manner? • Can you give examples where you have anticipated risk to avoid a breach of data security or confidentiality?
Experienced	<ul style="list-style-type: none"> • Do you use approved digital communication platforms and share files securely, using strong passwords? • Do you know how to report, without delay, any potential security breach? • Do you use software responsibly, only using secure systems and can you report potential security breaches?
Aware	<ul style="list-style-type: none"> • Can you explain why digital security and communication is important? • Can you use digital communication platforms such as Teams/Zoom/Slack and communicate professionally via email? • Do you use physical security devices when working in public places and can you identify a security breach?



DEVELOPING DIGITAL SECURITY AND COMMUNICATION

Developing digital security and communication, especially in connection with communication, involves setting clear guidelines, using secure tools and building a culture of professionalism, confidentiality and accountability in digital interactions. Here are some practical ways you can foster digital security and communication in your workplace:

1. PRACTICAL TRAINING

Mandatory training: Complete all training in aspects of digital security relevant to roles, covering areas such as passwords, access, data protection policies, phishing, threats. Use immersive phishing tests – provide realistic cyber security training. Look for the opportunity to practise recognising and responding to these.

Access control: Make sure you know how to set up permission levels for information sources, disclosure levels and other data/system access.

2. USE OF PHYSICAL TOOLS

Security items: Do you have appropriate security items, such as privacy screens, webcam covers, security keys and lockable bags/drawers. If not, ask for missing items.

Areas for privacy: Make appropriate use of meeting rooms for confidential discussions, protecting sensitive information. Avoid such conversations in open-plan offices.

3. "GO-TO" PEOPLE

GDPR team: Do you know who the designated person/team for compliance is and where to go for guidance? Do you feel able to report potential incidents in a safe, judgement-free setting?

IT experts: Do you know who is the designated person/team, whether internal or external, responsible for IT security and protection? Do you know who to go to with any issues?

4. SAFE COMMUNICATION SKILLS

Use secure interactions: Make sure you use approved platforms and tools, with only authorised access. Do you know how to use these safely?

Keep data confidential: Do you use secure links when sending data? Do you protect sensitive attachments with encrypted files or password protection?

5. STAY INFORMED

Company policies and procedures: Have you read and understood the organisation's digital policies and procedures – are these regularly updated and communicated?

Stay alert and up-to-date: What new threats are emerging? Follow trusted sources to maintain awareness. Share information within the team/office/organisation.



Check out [Specialised Learning courses](#) to help you further develop in these skills



FEEDBACK

What is it?

- An assessment of how someone is performing against expectations.
- Recognition of success and guidance for improvement.
- A tool for understanding how actions affect outcomes or decisions.
- Timely input to improve results and enhance performance.
- Offering and accepting insights to foster mutual understanding.

Key attributes of the skill

- You can differentiate between what is going well and where improvement is needed.
- You strengthen positive behaviours.
- You are engaged, motivated and appreciate others, enhancing team dynamics.
- You foster personal and professional growth.
- You address issues early.

You need to assess your own proficiency in the area of feedback – look at the questions below to give you an indication of where your proficiency level currently lies.

You will need to provide clear examples and evidence to your employer to support your self-assessment of your proficiency level.

Proficiency Level	Self-assessment questions
Accomplished	<ul style="list-style-type: none"> • Do you consistently give timely, specific, objective and actionable feedback to others? • Do you recognise effort in your team, not just the end results? • Do you reflect on feedback with honesty, make visible adjustments and follow up on progress?
Experienced	<ul style="list-style-type: none"> • Do you act and follow through on feedback, re-evaluating on a regular basis – reflecting and taking action? • Do you maintain a positive, non-defensive attitude during performance reviews, staying open minded? • Do you seek clarification and ask questions to aid understanding when receiving feedback without interrupting?
Aware	<ul style="list-style-type: none"> • Can you explain why feedback is important? • Can you give examples showing how constructive feedback has helped you to improve? • Do you proactively ask for, and act on, feedback?



DEVELOPING FEEDBACK

Developing feedback, especially in connection with communication, involves creating a culture of openness and trust, where continuous improvement is supported through honest dialogue and active listening. Here are some practical ways you can foster feedback and communication in your workplace:

1. OPEN FEEDBACK CULTURE

Normalise feedback: Provide feedback to other team members as a job progresses, don't wait until the end. Provide positive, ongoing reinforcement to encourage and motivate colleagues. Equally, highlight promptly any areas needing improvement and give opportunity for change. Use feedback loops.

Lead by example: Proactively ask for feedback on a timely basis and show that you welcome and value this, evidencing and reporting back action taken where appropriate.

2. BE SPECIFIC

What? When? Impact? Use clear, factual examples and keep the focus on behaviours, without it being a personal criticism when providing feedback to others. Explain the impact and clarify understanding. This will build trust with colleagues and more junior members of the team.

Clear expectations: Ensure there are clearly defined roles, responsibilities and SMART outcomes from the start. Ask for timelines and data points for progress.

3. LINK TO PROFESSIONAL DEVELOPMENT

Connect to learning goals: Understand how the feedback links to the skills you are developing. How are you doing against objectives? Turn feedback provided into your future goals and link to your look forward conversation.

Promote as a tool for learning: Consider future learning opportunities. Encourage team members to identify performance gaps and development needs. Support conversations around aspirations and what they need to do to progress further.

4. PROMOTE MULTI-DIRECTIONAL FEEDBACK

Feedback flows in all directions: Ask for multi-directional/360 feedback to be implemented if not in place. This will lead to greater collaboration and understanding.

Use tools to support input from all sides: Ensure that you feel able to provide open communication by using digital and non-digital means of providing multi-way evaluation, 360 reviews. Suggest anonymising to encourage unfiltered honesty.

5. TRAINING IN GIVING AND RECEIVING FEEDBACK

Providing feedback: Ask for tips on how to give difficult feedback respectfully, with care, and not to shy away from this. Try to be more proactive and to deliver positive feedback willingly to promote confidence and growth with more junior colleagues.

Taking feedback: Understand that receiving negative feedback is an opportunity to learn and to grow, try not to be defensive but instead adopt a receptive manner. "What action will I take?" "What can I learn from this?"



Check out [Specialised Learning courses](#) to help you further develop in these skills



CRITICAL THINKING





CRITICAL THINKING TOOLKIT

Critical thinking is the analysis of available data, information, observations and arguments to form reasoned judgement by the application of rational, sceptical and unbiased analysis and evaluation.

The five key skills of critical thinking are:

CURIOSITY	ADAPTABILITY	DIGITAL LITERACY	ANALYSIS AND EVALUATION	DECISIONS AND RECOMMENDATIONS
<p>Having a questioning mindset.</p> <p>Seeking out new experiences and perspectives with an open mind, avoiding judgement.</p> <p>It drives continuous learning and innovation and supports creative problem solving.</p>	<p>Adjusting our thoughts, feelings and behaviours with a positive attitude to deal with new, challenging or complex situations.</p> <p>It requires acknowledgement and acceptance rather than agreement.</p>	<p>The ability to successfully use digital technologies to find, evaluate, create and communicate information - shows technical proficiency.</p> <p>Understanding the ethical implications of digital interactions.</p>	<p>Making a methodical and detailed examination of information as a basis for interpretation.</p> <p>Considering alternative assumptions and assessing their impact on outcomes.</p> <p>It helps us to make informed judgements.</p>	<p>The process of assessing options and drawing conclusions.</p> <p>Assessing risks and their consequences and anticipating challenges.</p> <p>Determining the next steps to produce the best outcome for the short and long term.</p>



The following pages show you how to assess with yourself in each of these areas, as well as providing you with practical ideas on how to develop each skill in the workplace.



CURIOSITY

What is it?

- The desire to learn, explore and understand.
- Applying a questioning mindset.
- Having an open mind and avoiding judgement.
- Understanding why something is done in a particular way.
- Consideration of the bigger picture.

Key attributes of the skill

- You identify the root cause of the problem and opportunities for improvement.
- You anticipate issues and build in contingency.
- You see the plan from different angles and perspectives.
- You question source data for bias, reliability or completeness.
- You explore beyond the basics.

You need to assess your own proficiency in the area of curiosity – look at the questions below to give you an indication of where your proficiency level currently lies.

You will need to provide clear examples and evidence to your employer to support your self-assessment of your proficiency level.

Proficiency Level	Self-assessment questions
Accomplished	<ul style="list-style-type: none"> • Do you consistently think ahead, show openness to ideas and engage with other colleagues to understand other perspectives? • Do you look for issues and problems before they occur? • Can you provide examples of improvements that have been made as a result of questions you raised?
Experienced	<ul style="list-style-type: none"> • Can you describe scenarios where you conducted research and explored multiple options? • Can you think of examples where you have initiated open discussion to try to improve a process or output? • Do you seek feedback on performance?
Aware	<ul style="list-style-type: none"> • Can you explain why curiosity is important? • Can you describe situations where you have observed a colleague showing curiosity? • Can you describe where you have used a mixture of open and closed questioning to increase your understanding of something?



DEVELOPING CURIOSITY

Developing curiosity, especially in connection with critical thinking, involves creating a culture of exploration, inquiry and open-mindedness. Here are some practical ways you can foster curiosity and critical thinking in your workplace:

1. USE OPEN QUESTIONS AND EXPLORATION

Ask open-ended questions: Ask questions that don't have simple yes/no answers. For example, ask, "What else could we try?" or "How can we improve this process?"

Promote a "Why?" culture: Regularly ask "Why?" to challenge assumptions and encourage deeper analysis. Take time to dig deeper into the reasons behind decisions or actions.

2. IS EXPERIMENTATION ENCOURAGED?

Pilot projects: Are you able to test new ideas on a small scale? Having the opportunity to pilot projects will build your confidence and hence reduce the fear of failure.

Set aside time for curiosity: Dedicate time each week to explore new ideas, read about trends, or investigate solutions to problems.

3. LEARN THROUGH OBSERVATION

Learn by example: Ask colleagues if they can suggest articles, books, or case studies that have piqued their interest. Observe colleagues and managers in action, how do they integrate curiosity within critical thinking on a daily basis?

Challenge your own assumptions: In meetings or discussions, try to be more open-minded by openly questioning your own conclusions or previous decisions.

4. CHALLENGE CONVENTIONAL THINKING

"What if?" scenarios: Use "What if?" to think outside of the scenarios and the need to think through potential changes, disruptions or innovations.

Devil's advocate: Consider taking on the role of being devil's advocate (someone who pretends to oppose the idea or plan, to make everyone consider it in more detail) in meetings to challenge ideas and assumptions. This encourages thinking critically and exploring alternative viewpoints.

5. FOSTER OWNERSHIP OF IDEAS

Ownership of problems: Take ownership of solving specific problems. Being responsible for an outcome will improve engagement to find the best solutions.

Innovation challenges: Suggest having innovation challenges or hackathons where you can work with others on creative solutions to real problems. These events naturally promote both curiosity and critical thinking.



Check out [Specialised Learning courses](#) to help you further develop in these skills



ADAPTABILITY

What is it?

- The ability to adjust effectively to new conditions, changes or challenges.
- Being flexible and open-minded.
- A willingness to learn.
- Being able to shift priorities quickly.
- Being resilient – how you react to change.

Key attributes of the skill

- You thrive in a changing environment.
- You anticipate issues and plans appropriately.
- You embrace working with new teams.
- You adjust plans to meet new deadlines or changes in project scope.
- You support others and long-term efficiency.

You need to assess your own proficiency in the area of adaptability – look at the questions below to give you an indication of where your proficiency level currently lies.

You will need to provide clear examples and evidence to your employer to support your self-assessment of your proficiency level.

Proficiency Level	Self-assessment questions
Accomplished	<ul style="list-style-type: none"> • Do you consistently think ahead, show openness to new ideas and meet deadlines? • Do you look for issues and problems before they occur and adjust plans accordingly? • Can you provide examples of how you have supported others during change?
Experienced	<ul style="list-style-type: none"> • Can you think of examples where you have successfully worked with new teams? • Do you show a willingness to learn and engage? • Do you respond to multiple requests within appropriate timelines?
Aware	<ul style="list-style-type: none"> • Can you explain why adaptability is important? • Can you describe situations where adaptability was needed in the workplace? • Do you embrace technology?



DEVELOPING ADAPTABILITY

Developing adaptability especially in connection with critical thinking, involves creating a culture of flexibility, resilience and open-mindedness. Here are some practical ways you can foster adaptability and critical thinking in your workplace:

1. SHIFT YOUR MINDSET

Turn uncertainty into opportunity: Switch a question round into a positive opportunity. For example, "What can I learn from this?" rather than "Why is this happening to me?"

Embrace change rather than resisting it: Try to think of solutions rather than focusing on the problems which leads to frustration.

2. DEVELOP A HABIT OF LEARNING

Question your own understanding: Asking yourself if you understand and if not speak up. A questioning mind is an adaptable mind. Share your skills with others.

Set aside time for learning: Ask if you can dedicate time each week, or month, for learning something new or looking at new ideas and solutions to problems.

3. BUILD IN CONTINGENCY

Anticipate change: Create flexible plans, identify the risks and potential problems, plan ahead. Be proactive rather than reactive.

Step out of your comfort zone: Don't be afraid to challenge yourself. Ask if there are opportunities to take on a new task or responsibility.

4. SET SMALL GOALS

Build momentum: Can you break down bigger projects into smaller goals? This will help to build your confidence and make it easier to adapt to change while boosting your resilience.

Flexibility becomes the norm: This will reduce any anxiety and stress that change can bring if regularly flexing plans becomes second nature.

5. STRENGTHEN EMOTIONAL RESILIENCE

Pause before reacting: Try stepping back for a moment to allow the space needed to choose how to respond.

Build support networks: Think about who you can rely and lean on if change becomes overwhelming – both in and outside of the workplace. What works for you? Implement stress management techniques.



Check out [Specialised Learning courses](#) to help you further develop in these skills



DIGITAL LITERACY

What is it?

- The ability to use digital tools confidently and responsibly.
- Communicating and collaborating through digital platforms.
- Assessing and analysing digital data.
- Being mindful of online safety and ethics.
- Being able to adapt to new and evolving technology.

Key attributes of the skill

- You are technically proficient at using devices, systems and software.
- You are confident analysing and interpreting financial data.
- You consider the reliability and credibility of digital information.
- You are effective at working remotely and confident in virtual meetings.
- You understand, and implement, responsible online behaviour.

You need to assess your own proficiency in the area of digital literacy – look at the questions below to give you an indication of where your proficiency level currently lies.

You will need to provide clear examples and evidence to your employer to support your self-assessment of your proficiency level.

Proficiency Level	Self-assessment questions
Accomplished	<ul style="list-style-type: none"> • Do you assist colleagues or others with the use of digital tools? • Can you describe scenarios where you have been able to solve problems using technology? • Do you instinctively use technology to analyse information, present data and solve problems?
Experienced	<ul style="list-style-type: none"> • Can you give examples showing your ability to adapt to changing technology? • Do you seek opportunities to improve efficiency through the use of digital tools and new technologies? • Can you use technology for daily tasks with minimal support?
Aware	<ul style="list-style-type: none"> • Can you explain why digital literacy is important? • Can you provide examples of how digital technology was used to complete tasks more efficiently? • Can you give examples of your responsible online behaviour?



DEVELOPING DIGITAL LITERACY

Developing digital literacy, especially in connection with critical thinking, involves creating a culture using digital tools and technology to create effective evaluation, problem solving and communication, within an ethical environment. Here are some practical ways you can foster digital literacy and critical thinking in your workplace:

1. BE COMFORTABLE WITH CORE WORKPLACE TOOLS

Onboarding: Ask, as part of your onboarding, what the core workplace tools are and what training is provided.

Cyber security and compliance: Be able to recognise phishing emails, sensitive data and know what internal controls are in place.

2. USE DIGITAL COMMUNICATION AND COLLABORATION

Boost productivity: Try using AI-powered assistants for summarising meetings or helping to write notes or reports.

Move towards more collaborative working tools: Try using shared messaging boards, chat rooms and file sharing to promote collaborative working.

3. MEET STAKEHOLDER EXPECTATIONS

Handling role responsibilities: Are you confident using business software, tools and systems to deliver day-to-day tasks?

Use data-driven insights: Think about different digital solutions to solve business problems and enhance decision-making.

4. ON-THE-JOB TRAINING

Time for training: Ask if you can attend workshops or have time to try out specific training platforms to build your confidence and expertise in using digital tools, technologies and platforms.

Ask questions: Ask a question if you are unsure. Asking, rather than guessing, shows self-awareness, reduces errors and saves time. It supports your personal growth. Know who to go to, are there digital champions available to offer support and guidance?

5. EMBRACE NEW TECHNOLOGY

Be open to change: Embrace the use of new technology, see it as an opportunity, not a problem. Explore the benefits and understand how it might support organisational goals.

Lead by example: Be a positive influence. Let colleagues see how you use technology to improve efficiency and workflow.



Check out [Specialised Learning courses](#) to help you further develop in these skills



ANALYSIS AND EVALUATION

What is it?

- Gathering and breaking down information into smaller parts to aid understanding.
- Identifying patterns, trends and inconsistencies.
- Comparing data against expectations.
- Challenging and questioning assumptions.
- Making reasoned judgements.

Key attributes of the skill

- You have a deep understanding of information.
- You assess the significance of data.
- You provide critical interpretation to collate meaningful insights.
- You identify relationships, similarities and differences.
- You use reasoning and structure to examine ideas and processes.

You need to assess your own proficiency in the area of analysis and evaluation – look at the questions below to give you an indication of where your proficiency level currently lies.

You will need to provide clear examples and evidence to your employer to support your self-assessment of your proficiency level

Proficiency Level	Self-assessment questions
Accomplished	<ul style="list-style-type: none"> • Can you critically assess the credibility and limitations of data sources? • Do you make recommendations using analytical insight? • Do you look for correlations, segment outputs and use visualisations to present your analysis?
Experienced	<ul style="list-style-type: none"> • Can you analyse data and explain your evaluation? • Can you spot, and question, anomalies or something that just “doesn’t feel quite right”? • Can you explain the source, hence reliability and validity of the data, including data bias and the impact this may have on your evaluation?
Aware	<ul style="list-style-type: none"> • Can you explain why analysis and evaluation is important? • Can you give examples where you have prepared data for analysis? • Can you give examples where you have identified the need for further information?



DEVELOPING ANALYSIS AND EVALUATION

Developing analysis and evaluation, especially in connection with critical thinking, involves creating a culture of systematic thinking, questioning and reasoning. Here are some practical ways you can foster analysis and evaluation and critical thinking in your workplace:

1. HANDS-ON TASKS

Calculate and evaluate: Practise analysing information and think about going “beyond the numbers”. Ask for opportunities to practise.

Present findings: Think ahead, can you provide explanations and solutions, not just raw data? Use visualisation tools and show an understanding of the numbers.

2. HAVE A QUESTIONING MIND

“Why?”: Question the numbers. “Does this make sense?” “What is the reason for this?”

Build confidence to ask questions: Do you know when to ask questions to explore information further? Do you feel confident to ask questions – is it a safe space? Is there an alternative?

3. USE TOOLS TO ENABLE EFFECTIVE ANALYSIS

Financial tools: Are you proficient in the use of relevant software for your day-to-day activities? Do you need any training?

Analytical techniques: Ask for time to complete training in the use of key metrics, ratios and analysis tools and sources. Do you know who to go to for help?

4. APPRECIATION OF EXTERNAL FACTORS

Impact of worldwide events: Consider analysis and evaluation on a wider level. Look at global influences.

What is happening in the financial space? Are there underlying external factors affecting markets, sectors, currencies etc?

5. DIG DEEPER THAN THE FINANCIAL INFORMATION

Strategic planning: Analyse data to recommend courses of action. Challenge assumptions to improve outcomes.

Risks and opportunities: Look for “red flags” and highlight concerns. Can you seek support from others? Turn risks into opportunities to develop and improve.



Check out [Specialised Learning courses](#) to help you further develop in these skills



DECISIONS AND RECOMMENDATIONS

What is it?

- Making informed suggestions to guide decision-making.
- Selecting a course of action based on data, priorities and goals.
- Providing conclusions based on reasoning, knowledge, analysis and experience.
- Consideration of different options and their consequences.
- Proposing solutions to aid smart decision-making.

Key attributes of the skill

- You present alternatives as a basis for choice.
- You provide clear justification for proposed solutions.
- You take responsibility for proposals.
- You highlight and identifies challenges and risks.
- You work independently but know when to ask for help.

You need to assess your own proficiency in the area of decisions and recommendations – look at the questions below to give you an indication of where your proficiency level currently lies.

You will need to provide clear examples and evidence to your employer to support your self-assessment of your proficiency level.

Proficiency Level	Self-assessment questions
Accomplished	<ul style="list-style-type: none"> • Do you consider the impact of decisions and recommendations on others? • Do you reflect on past decisions to learn and improve? • Do you demonstrate strategic awareness in your recommendations?
Experienced	<ul style="list-style-type: none"> • Do you consistently apply professional judgement in making timely ethical decisions? • Do you support recommendations with objective analysis of data, trends, benchmarks and forecasts, considering risks of options? • Can you give examples showing where your recommendations have made an impact?
Aware	<ul style="list-style-type: none"> • Can you explain why being able to make decisions and recommendations is important? • Can you explain your approach to decision-making? • Do you understand when it is appropriate to make a decision and when to seek advice?



DEVELOPING DECISIONS AND RECOMMENDATIONS

Developing decisions and recommendations, especially in connection with critical thinking, involves creating a culture of questioning, evaluating and drawing conclusions based on evidence and anticipation of outcomes. Here are some practical ways you can foster decisions and recommendations and critical thinking in your workplace:

1. UNDERSTAND WHAT IS NEEDED

Think in terms of outcomes: Consideration of both the context of the issue and how the end result needs to look are equally important. "What steps are needed?"

Clarification: Do you understand the problem? Check this with the rest of the team. "Why does it matter?" Establishing a clear grasp of the requirement leads to better decisions.

2. DEVELOP RISK AWARENESS

Balance confidence with caution: Understand when it is appropriate to go ahead and when to seek input/consult with senior colleagues. "Is this a low-risk decision?"

Assess risk: "What could go wrong if a decision is incorrect?" "How likely is this?" Consideration of mitigations and managing uncertainty.

3. PRACTISE REFLECTIVE AND CRITICAL THINKING

Past decisions/recommendations: "How did they work out?" "Were your reasonings backed up by sufficient evidence?" Learn from mistakes – opportunities to develop and improve.

Question decisions/recommendations: "Was anything missed?" "Were there alternative viewpoints?" "What was the impact on others?"

4. DEVELOP CONFIDENCE IN RECOMMENDING SOLUTIONS

Evidence based: Provide recommendations by linking facts and data, new or historic. Be able to support your recommendations.

Alternatives: "Are there alternative options/viewpoints?" Have supporting evidence to support different options – consider the pros and cons of each. Anticipate questions and likely concerns.

5. BE ACCOUNTABLE

Empowerment: Make decisions appropriate to your role. Discuss opportunities to develop your decision-making in a safe space, in an environment where asking questions is encouraged, building trust. Understand boundaries and expectations.

Clear expectations: "What am I responsible for?" "How does this fit into the bigger picture?" "How does it impact wider teams?" "Who should I report findings to?"



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EMOTIONAL INTELLIGENCE





EMOTIONAL INTELLIGENCE TOOLKIT

Emotional intelligence is how we understand, manage and influence ourselves and others.

The five key skills of emotional intelligence are:

SELF-AWARENESS	VALUES	RESILIENCE	EMPATHY	APPRECIATING OTHER VIEWPOINTS
<p>Being true to your own personality, values and beliefs.</p> <p>Understanding the impact on yourself and others.</p> <p>Being honest with yourself and with others.</p> <p>A feeling of psychological safety.</p>	<p>Exploring your own values and considering how they align with organisational core values.</p> <p>Being respectful of others' values.</p> <p>Understanding the importance of values in the workplace and helping to thrive in a positive and encouraging environment.</p>	<p>Acknowledging difficulties, adjusting your path, learning from experiences and finding healthy ways to move forward – emotional regulation.</p> <p>Understanding trigger points and building support networks.</p> <p>Developing emotional strength to foster calmness and positivity.</p>	<p>Understanding and sharing the feelings of another person.</p> <p>Active and reflective listening, acknowledging and accepting different perspectives and emotions and responding appropriately.</p> <p>Being aware and supportive of others' emotions and experiences.</p> <p>Connecting with someone and understanding their needs.</p>	<p>Promoting the fair treatment and full participation of everyone.</p> <p>Being non-judgemental, encouraging open discussion and being aware of unconscious bias.</p> <p>Contributing to a culture of inclusivity.</p> <p>Encouraging diverse perspectives and challenge.</p>



The following pages show you how to assess yourself in each of these areas, as well as providing you with practical ideas on how to develop each skill in the workplace.



SELF AWARENESS

What is it?

- Understanding yourself – your values, beliefs and emotions.
- Recognising the impact your behaviours have on others.
- Being mindful, open and willing to improve.
- Adapting behaviours and actions as needed.
- The foundation of emotional intelligence and personal growth.

Key attributes of the skill

- You facilitate emotional self-regulation.
- Improves your communication skills.
- Enables more effective teamwork and leadership.
- Supports you in good decision-making.
- Helps you promote personal growth and development.

You need to assess your own proficiency in the area of self awareness – look at the questions below to give you an indication of where your proficiency level currently lies.

You will need to provide clear examples and evidence to your employer to support your self-assessment of your proficiency level.

Proficiency Level	Self-assessment questions
Accomplished	<ul style="list-style-type: none"> • Do you consistently demonstrate high awareness of emotions, tensions and pressures, managing yourself and others through challenging situations? • Do you demonstrate behaviours aligned with your values, even when challenged? • Can you handle conflict calmly, constructively and without blame, considering how others may feel?
Experienced	<ul style="list-style-type: none"> • Do you demonstrate a respect for professional boundaries, recognising your emotional trigger points? • Do you adapt your approach when necessary, recognising the impact of differing body language and personalities? • Do you acknowledge and appreciate your own development needs, understanding your limitations?
Aware	<ul style="list-style-type: none"> • Can you explain why self-awareness is important? • Can you provide examples of where you have needed to manage your emotions and reactions? • Do you respond positively to feedback without being defensive?



DEVELOPING SELF AWARENESS

Developing self awareness, especially in connection with emotional intelligence, involves creating a culture of reflection on the impact of behaviours, accepting feedback, and embracing action to grow. Here are some practical ways you can foster self awareness and emotional intelligence in your workplace:

1. DEVELOP ACCURATE SELF-PERCEPTION

Understand yourself: Take time to look at yourself – step back and take an unbiased and undistorted analysis of your strengths, weaknesses, emotions and habits. How do your behaviours affect others?

Understand your abilities: Do you know your strengths and limitations? Do you ask for support where development may be needed? Being honest about your capabilities will help you to make better decisions, build humility, improve collaboration and increase awareness.

2. TAKE TIME FOR SELF-REFLECTION

Analyse thoughts, actions and emotions: “What happened?” “Why does it matter?” “How will I do things differently next time?”

Get feedback from others: Clarify what is being said. Try to separate emotion from fact. Look for patterns and repeated themes. “How will I learn and improve?”

3. NOTICE EMOTIONAL TRIGGERS

Pay attention: When do you feel defensive, impatient, dismissive or anxious? Recognising triggers is a sign of maturity and increased self-awareness.

Consider responses: Are you reactive, or do you provide calm, constructive responses? Are you able to manage your behaviour “in the moment”?

4. WHAT IMPRESSION DO YOU CREATE?

Do your intentions match your behaviour? Ask other team members whether there is ever a disconnect between what you mean and how you come across. “Am I showing up the way I want to?”

Alignment with core values: Are you behaving authentically and aligned to your own values? Do you consistently act with integrity?

5. LEAD BY EXAMPLE

Reflect on your own self-awareness journey: Be open and honest about mistakes made, lessons learned and feedback received.

Demonstrate humility: Acknowledge your own limitations and explore opportunities to learn.



Check out [Specialised Learning courses](#) to help you further develop in these skills



VALUES

What is it?

- Having core principles and beliefs.
- Acting in a way that reflects the person you strive to be.
- A moral and ethical inner compass.
- A framework to prioritise what matters most.
- Emotional drivers that shape behaviours.

Key attributes of the skill

- Your values guide ethical behaviour.
- Your supportive and encouraging attitude fosters a positive work culture.
- Enhances your decision-making.
- You build respect and trust with stakeholders.
- You consistently promote team motivation and engagement.

You need to assess your own proficiency in the area of values – look at the questions below to give you an indication of where your proficiency level currently lies.

You will need to provide clear examples and evidence to your employer to support your self-assessment of your proficiency level.

Proficiency Level	Self-assessment questions
Accomplished	<ul style="list-style-type: none"> • Do you consistently model business and personal values through your own actions? • Do you ensure that your teams/colleagues feel valued through showing appreciation, respect and trust? • Do you consider values as part of your decision-making and reference those values in explanations?
Experienced	<ul style="list-style-type: none"> • Do you show professional values in taking responsibility for the accuracy and integrity of your work? • Do you demonstrate value-driven behaviour in your interactions with colleagues and stakeholders, aligning what you say and do? • Can you describe scenarios to show where you have respected the values of others and been open to different viewpoints?
Aware	<ul style="list-style-type: none"> • Can you explain why values are important? • Can you describe situations where your values influenced or changed your behaviour in the workplace? • Do you understand the business's core values and how your own personal values align with these?



DEVELOPING VALUES

Developing values, especially in connection with emotional intelligence, involves creating a culture where people feel heard, supported and connected to a shared purpose. Here are some practical ways you can foster values and emotional intelligence in your workplace:

1. KNOW THE CORE VALUES OF THE BUSINESS

Awareness: Do you understand the core values of the organisation? Are they transparent? Do you know what is expected of you?

Reflect the desired culture: Do the core business values reflect the behaviours and workplace environment? Identify and discuss any disconnects.

2. LINK TO ETHICS

Becoming trusted professionals: Take time to consider your personal and organisational values when making ethical decisions. Does your role and behaviour support trust, transparency and fairness?

Embed values: Ensure that values are embedded in all that you do – the foundations supporting trusted relationships, business resilience and sustainable growth.

3. “ACTIONS SPEAK LOUDER THAN WORDS”

Model your values: Try to put your personal values/ the business’s values into action through behaviours in meetings, conversations and connections with stakeholders. Support colleagues by recognising when they act in ways representative of their own and the business’s values.

“Walk the walk”: Demonstrate the values set and establish trust in these values. Be clear and authentic.

4. FEELING VALUED

Creating a culture of value: Encourage an environment where people feel seen, respected and appreciated. Do you feel that your strengths are recognised and valued?

Create a sense of belonging: Acknowledge colleagues’ achievements and contributions. Reflect and reframe your thoughts into positive outcomes – “I’m a trainee and still learning – my contribution to the team is valued” rather than considering yourself as a burden.

5. RESPECTING THE VALUES OF OTHERS

Acknowledge differences respectfully: Actively listen to different perspectives and use inclusive language. Ask questions to understand rather than to challenge. Consider the opinion rather than the person who gave it.

Education: Expand your awareness of cultural and ethical diversity. Explore how values differ between cultures, religions and communities. Seek opportunities to engage in continuous learning about diversity, equity and inclusion topics.



Check out [Specialised Learning courses](#) to help you further develop in these skills



RESILIENCE

What is it?

- The ability to bounce back and recover from challenges and setbacks.
- Being able to adapt to change and navigate uncertainty.
- Staying strong under pressure.
- Continually improving as a result of challenges.
- Physical, mental and emotional strength.

Key attributes of the skill

- You show stamina and focus when workloads are high.
- You recover well when mistakes happen.
- You are adaptable in a changing environment.
- You stay motivated during setbacks.
- You remain calm and are flexible when things don't go to plan.

You need to assess your own proficiency in the area of resilience – look at the questions below to give you an indication of where your proficiency level currently lies.

You will need to provide clear examples and evidence to your employer to support your self-assessment of your proficiency level.

Proficiency Level	Self-assessment questions
Accomplished	<ul style="list-style-type: none"> • Do you consistently show strength and leadership in times of high-pressure challenges? • Do you empower and help others to build resilience? • Can you give examples of how you have been able to thrive in challenging situations, using setbacks as opportunities for growth?
Experienced	<ul style="list-style-type: none"> • Can you highlight examples of how you have adapted and responded positively to last-minute changes? • Can you describe situations where you have successfully managed emotions, pressure and workload – staying focused with conflicting demands? • Do you recognise trigger points and adopt coping strategies to manage these and bounce back?
Aware	<ul style="list-style-type: none"> • Can you explain why resilience is important? • Can you effectively balance work, your personal life and study, are you organised, meeting deadlines, turning up on time? • Do you take time to reflect and act on feedback, with a desire to learn from it?



DEVELOPING RESILIENCE

Developing resilience, especially in connection with emotional intelligence, involves creating a culture of remaining calm under pressure, helping team members adapt to change, manage stress and grow from setbacks. Here are some practical ways you can foster resilience and emotional intelligence in your workplace:

1. MASTER TIME AND WORKLOAD MANAGEMENT

Prioritisation: Identify and focus on the most important and impactful tasks first. This will help to reduce time-pressured stresses.

Scheduling and planning: Use time-management tools to structure work efficiently. Set small, manageable goals to build resilience.

2. KNOWLEDGE BUILDING

Build on existing knowledge: Focus on expanding knowledge and skills to improve confidence and resilience in high-pressure situations. Set yourself learning goals and expand your expertise to strengthen your ability to recover from setbacks.

Foster belief in abilities: Empower team members to trust their skills and judgement. This will encourage self-confidence and growth. Focus on what you can control.

3. SHADOW LEADERSHIP

Demonstrate resilience: If possible, ask to shadow managers and the senior leadership team. Experience them remaining calm, adapting and being solution-focused under pressure.

Model coping strategies: What works for others, might help you – ask colleagues what coping strategies they implement. Try taking breaks and setting boundaries. Build healthy routines.

4. CREATE A SUPPORT SYSTEM

Use mentors: Have a “go to” person who can offer guidance, perspective and support during difficult times. This provides a safe space for reflection, navigating and growing from setbacks. Have a support network in and outside of the workplace.

Reduce fear of failure: Reframe failure as an opportunity to learn. Treat yourself with kindness, it promotes recovery and emotional stability. Allow yourself time to reflect and recover.

5. BUILD SELF-AWARENESS

Understand triggers: “How do you react to pressure and stressful situations?” “What worked?” “What didn’t?” “How would you handle similar situations in the future?”

Interaction with others: If something isn’t working, or hasn’t gone to plan, focus on solutions, don’t look for blame. Be conscious of how your reaction affects your colleagues reactions – be calm and approachable.



Check out [Specialised Learning courses](#) to help you further develop in these skills



EMPATHY

What is it?

- The ability to recognise and understand the feelings of others.
- Responding in a supportive or compassionate way.
- Emotionally connecting with others.
- Imagining yourself in someone else's shoes.
- Noticing non-verbal cues.

Key attributes of the skill

- Facilitates the building of stronger relationships and trust.
- Your approach improves inclusive leadership.
- You help to reduce conflict.
- You actively listen and recognise the importance of body language.
- You recognise the challenges others face and respond appropriately.

You need to assess your own proficiency in the area of empathy – look at the questions below to give you an indication of where your proficiency level currently lies.

You will need to provide clear examples and evidence to your employer to support your self-assessment of your proficiency level.

Proficiency Level	Self-assessment questions
Accomplished	<ul style="list-style-type: none"> • Do you provide mindful and considerate feedback for your team? • Do colleagues find it easy to come to you with their concerns – an open door without judgement? • Do you consistently consider the human impact of financial decisions, not just numbers and compliance?
Experienced	<ul style="list-style-type: none"> • Can you give examples of scenarios where you have adjusted your communication style to recognise emotional needs? • Do you check in on colleagues following challenging interactions? • Do you actively support others during periods of change or uncertainty?
Aware	<ul style="list-style-type: none"> • Can you explain why empathy is important? • Do you understand the need for a balance between caring for others, while respecting emotional boundaries? • Do you recognise when colleagues may need help and offer support?



DEVELOPING EMPATHY

Developing empathy, especially in connection with emotional intelligence, involves listening actively, understanding others' emotions and fostering a supportive, respectful team culture. Here are some practical ways you can foster empathy and emotional intelligence in your workplace:

1. BE RESPECTFUL

Active listening: Listen attentively, don't get distracted by phones and other things going on. Consider putting your phone away. Reflect back on what was said: "It sounds like you are feeling ..."

Respond with care and understanding: Don't always try and fix the problem, instead offer support and reassurance. Know when to step away and give someone space. Ask open-ended questions.

2. USE OPEN DIALOGUE

Regular check-ins: Put regular catch-ups in with your manager or mentor. Openly share any concerns or challenges you have had.

Lead by example: Model open and respectful communication. Pause before judging a colleague, don't make assumptions, instead take the time to offer support and ask if they need help.

3. PERSONAL DEVELOPMENT

Create time for learning: Take time to think about what it might be like to "walk in someone else's shoes". Ask whether there are any practical workshops that you could attend. This is a great way to learn and develop an appreciation of diversity and differing perspectives.

Emotional intelligence training: Ask your manager about attending an empathy workshop/structured training to strengthen your ability to enhance emotional connection, understanding and interpersonal skills.

4. THINK BEYOND YOURSELF

Consider all views: Always take the time to try to understand, even when you don't agree. Foster consideration for the needs of others and how decisions affect the whole team.

Building stronger teams: Be a supportive team player, recognising and responding to each other's needs. Think about team goals ahead of your personal ones.

5. UNDERSTAND OTHERS

Shadowing: Are you able to spend time with other teams/watching people in other roles – shadowing opportunities? What challenges do they face? Stepping back and watching often bridges the gap between classroom learning and actual workplace practice.

"Remember when?": Ask more senior team members to share their own experiences in a more junior role. Allow them to reflect and remember the challenges and frustrations faced.



Check out [Specialised Learning courses](#) to help you further develop in these skills



APPRECIATING OTHER VIEWPOINTS

What is it?

- Actively considering perspectives that are not your own.
- Being open-minded and curious.
- Embracing and respecting diverse opinions.
- Willingness to challenge your own assumptions.
- Treating differences with fairness and understanding.

Key attributes of the skill

- Encourages trust and mutual respect.
- Reduces conflict by better understanding.
- Helps you to challenge and be mindful of unconscious bias.
- Facilitates better teamwork by ensuring all voices are heard.
- Leads to better, more inclusive decisions and problem solving.

You need to assess your own proficiency in the area of appreciating other viewpoints – look at the questions below to give you an indication of where your proficiency level currently lies.

You will need to provide clear examples and evidence to your employer to support your self-assessment of your proficiency level.

Proficiency Level	Self-assessment questions
Accomplished	<ul style="list-style-type: none"> • Do you encourage and facilitate differing opinions in group discussions and meetings and adapt accordingly? • Do you integrate diverse viewpoints, based on team insight, into your decision-making? • Can you provide examples to show how you have built trust and collaboration across diverse teams?
Experienced	<ul style="list-style-type: none"> • Can you give examples to show that being able to see things from an alternative point of view has resulted in a better business outcome? • Can you demonstrate your ability to adapt communication and working styles to accommodate diverse perspectives? • Do you welcome and give feedback with respect and openness?
Aware	<ul style="list-style-type: none"> • Can you explain why it is important to appreciate other viewpoints? • Do you demonstrate an awareness of unconscious bias, diversity and inclusion? • Do you listen attentively, without interruption, even when you disagree?



DEVELOPING APPRECIATING OTHER VIEWPOINTS

Developing appreciating other viewpoints, especially in connection with emotional intelligence, involves creating a respectful environment where diverse perspectives are acknowledged and valued. Here are some practical ways you can foster appreciating other viewpoints and emotional intelligence in your workplace:

1. ENGAGE WITH DIVERSITY

Celebrate differences: Consider how individuals with different backgrounds, cultures, identities and experiences will introduce alternative ways of thinking. Ask colleagues to share their experiences and views for a wider perspective.

Be culturally and diversity aware: Are you mindful of holidays, religious practices, traditions or other diversities that may be different from your own? Question your own biases and continue to learn and be open.

2. COLLABORATION ACROSS FUNCTIONS

Connect with other departments/teams: Understand how decisions can impact other areas of the business. "Why may they have different priorities, challenges and therefore perspectives?"

Look beyond just the task: Consider people, processes, goals and impacts as a whole – integrated decision-making. Stop and stand back to look at the whole picture not the individual parts.

3. BE RESPECTFUL

Show humility: You won't always agree, but rather than dismissing other's views and opinions take the time to objectively look at the reasons for their opinion. Each point of view has merit. Stay open to changing your mind.

Practise respectful listening: Give others the space to speak and finish speaking. Use positive and encouraging body language to signal interest. Actively include quieter members of the team, as they may have valuable insights.

4. BE OPEN TO DIFFERENT WORKING STYLES

Appreciate varying approaches: Look at being flexible in your work style. There are often alternative ways to achieve the same end point, as long as everyone is working to the same goals.

Respect one another's strengths: Look to work together in a collaborative way to experience the improved value from incorporating different problem-solving techniques and thinking.

5. BALANCE NEW AND EXPERIENCED PERSPECTIVES

Junior vs senior team members: You may bring fresh thinking and question the status quo of outdated processes – bringing new ideas, while your senior colleagues bring experience and knowledge, focusing on strategy and the "bigger picture". Suggest time together to consider both perspectives.

Be willing to adapt: Listen to different viewpoints with curiosity and be open to learning from both new and experienced team members. Try to connect existing practices with new ideas and solutions.



Check out [Specialised Learning courses](#) to help you further develop in these skills



LEADERSHIP





LEADERSHIP TOOLKIT

Leadership is guiding and inspiring others towards a common goal.

The five key skills of leadership are:

COLLABORATION	PROJECT MANAGEMENT	DIGITAL CAPABILITY AND INNOVATION	DEVELOPING SELF	DEVELOPING OTHERS
<p>Working together, positively sharing expertise to achieve a common goal.</p> <p>Combining different perspectives and skills to create a better outcome.</p> <p>Actively encouraging open and inclusive communication.</p> <p>Inspiring trust and motivation to encourage a more cohesive work environment.</p>	<p>The process of planning, organising and overseeing the work of a team, to achieve shared goals within given constraints such as time, budget and stakeholders.</p> <p>Making sure that the right work gets done at the right time, by the right people – it anticipates risks and resolves conflicts.</p>	<p>Using digital technology to solve problems and improve performance.</p> <p>Looking at new and emerging technologies for better solutions to improve efficiency and implementation.</p> <p>Combining technical confidence with creativity and curiosity for continuous improvement.</p>	<p>Actively appraising your own self-development and personal growth.</p> <p>Being self-aware by consciously pursuing continual learning to improve your skills, knowledge, behaviours and mindset.</p> <p>Taking ownership of your own learning and development.</p>	<p>Actively supporting the growth, learning and success of your team.</p> <p>Identifying and supporting development opportunities for others.</p> <p>Providing effective coaching, mentoring, encouragement and feedback.</p> <p>Building confidence and improving skillsets in others.</p>



The following pages show you how to assess yourself in each of these areas, as well as providing you with practical ideas on how to develop each skill in the workplace.



COLLABORATION

What is it?

- Working together to achieve a common goal.
- Bringing people with different skills and expertise together.
- Sharing ideas, tasks and responsibilities.
- Openly communicating and supporting one another.
- Coordinating group efforts to ensure tasks are completed accurately and efficiently.

Key attributes of the skill

- You embrace diverse teams with independence of thinking, leading to better solutions and opportunities to learn.
- Improves communication, mutual trust and respect.
- Creates efficiencies by division of workloads to align with skillsets.
- Improves your efficiency and reduces duplication.
- You openly promote innovation and creativity.

You need to assess your own proficiency in the area of collaboration – look at the questions below to give you an indication of where your proficiency level currently lies.

You will need to provide clear examples and evidence to your employer to support your self-assessment of your proficiency level.

Proficiency Level	Self-assessment questions
Accomplished	<ul style="list-style-type: none"> • Do you consistently include others and value different perspectives when making decisions? • Do others regularly seek your input because you actively listen and contribute respectfully? • Do you look to work across teams/department to drive better outcomes?
Experienced	<ul style="list-style-type: none"> • Do you willingly work as part of a team, embracing and celebrating success for the group, not just yourself – prioritising team goals? • Do you demonstrate an openness to new ideas and different ways of doing things? • Can you describe situations where you have needed to compromise, with an understanding for the bigger picture?
Aware	<ul style="list-style-type: none"> • Can you explain why collaboration is important? • Can you give examples where you have worked as part of a wider team? • Do you offer help to support colleagues during busy periods?



DEVELOPING COLLABORATION

Developing collaboration, especially in connection with leadership, involves creating a culture of trust, open communication and empowering others to work together effectively, taking shared ownership of outcomes. Here are some practical ways you can foster collaboration and leadership in your workplace:

1. BE A TEAM PLAYER

Team priorities vs personal goals: Look at the wider team's priorities rather than your own personal goals and assignments. Use inclusive language – “we” and “us”. Don't over dominate the task and help others.

Opportunities for collaboration: Ask your manager if there are any opportunities to work on larger team projects and work that needs input from others.

2. OPEN AND ONGOING COMMUNICATION

Have regular check-ins: Put time in your diary to have regular updates, to check progress and address any challenges. Also use this time to acknowledge small wins.

Discussion, debate and negotiation: Actively listen and be respectful, have open and honest dialogue. Do you feel heard and understood?

3. CREATE ACCOUNTABILITY

Clear roles and responsibilities: “Who is doing what?” Be flexible and adjust roles to help others as needed.

Establish time frames and expectations: Do you understand the vision? What is the end goal? Do you know how your contribution fits in? Is everyone clear on the plan? Be clear on any deadlines.

4. UNDERSTAND TEAM MEMBERS' STRENGTHS

Match skills to roles: What are your strengths? Have you showcased these strengths, are they being used and capitalised on? Share your unique skills portfolio to the wider team.

Balance the team: Is the team balanced? Take time to listen to colleagues and have an open mind considering alternative viewpoints. Face conflict with understanding and positivity.

5. ACTIVE ENGAGEMENT

Openly participate: Volunteer to speak up and to take forward actions. Avoid blame, learn from mistakes. Encourage others to actively engage and play their part.

Knowledge sharing: Engage with other teams to build relationships, enhance knowledge sharing and reinforce the value in breaking down silos. Can you use shared collaboration tools? Look to the wider vision.



Check out [Specialised Learning courses](#) to help you further develop in these skills



PROJECT MANAGEMENT

What is it?

- Defining goals, timelines, resources and tasks.
- Setting clear objectives to define and deliver project outcomes.
- Allocating resources to reach project goals.
- Identifying potential risks and issues before you impact progress.
- Monitoring and tracking progress.

Key attributes of the skill

- You allocate time, people and budgets effectively.
- You keep tasks on track by monitoring progress and amending as needed.
- You are efficient and reliable at delivering outputs.
- You manage multiple tasks and deadlines.
- You collaborate with all parties and stakeholders.

You need to assess your own proficiency in the area of project management – look at the questions below to give you an indication of where your proficiency level currently lies.

You will need to provide clear examples and evidence to your employer to support your self-assessment of your proficiency level.

Proficiency Level	Self-assessment questions
Accomplished	<ul style="list-style-type: none"> • Do you consistently manage multiple workflows, taking full ownership at each stage? • Do you have examples where you have anticipated problems and spoken up to manage risk and keep assignments on track? • Can you confidently and successfully oversee, guide and coordinate teams to keep tasks on track and deliver successful outcomes?
Experienced	<ul style="list-style-type: none"> • Do you clarify understanding of expectations and clearly relay that to other team members? • Do you demonstrate an appreciation and respect for budgets when undertaking tasks? • Do you maintain quality of output, delivered on time, even under pressure?
Aware	<ul style="list-style-type: none"> • Can you explain why project management is important? • Do you maintain organised records? • Do you manage your time and prioritise tasks effectively?



DEVELOPING PROJECT MANAGEMENT

Developing project management, especially in connection with leadership, involves setting clear goals, delegating tasks and creating a culture of open communication, ensuring timely delivery of the vision. Here are some practical ways you can foster project management and leadership in your workplace:

1. PRIORITISATION AND TIME MANAGEMENT

Effective planning: Take time to plan up-front, paying attention to what is important and allocate resources in the best way to meet this. Allow buffers in case of unexpected delays – contingencies. Remember it is OK to say no.

Set realistic deadlines: Have regular check-in points and break tasks down into smaller chunks. Assign estimates of time to each aspect of the project, together with detailed timelines covering the full scope.

2. RECOGNISE SKILLSETS

Delegate effectively: Ensure tasks are assigned fairly based on experience and expertise. Consider stepping up to gain experience in low-risk areas.

Match tasks to the right person: Support the project manager in identifying skills, strengths, experience and availability. Where are your strengths, are tasks matched to these?

3. DEVELOP COMMUNICATION SKILLS

Look at interactions: Practise active listening. What is the objective of the meeting, is it clear? Drive the discussion in a focused way, bringing it back on track if necessary.

Interpersonal relationships: Use positive and supportive language. Offer assistance to contribute to project/task goals. Be proactive while providing enthusiasm and encouragement to the team.

4. CLARITY AND EXPECTATIONS

What is the project scope? Are there clearly defined expectations and deliverables? Do you know what these are and is everyone involved on board with these? Identify any project risks.

Have ongoing updates: Is there an initial kick-off meeting planned to set out team responsibilities and timelines? If not, suggest that one is put in place. Make sure regular updates are provided and milestones are tracked throughout the project. Keep a central project hub.

5. PERSONAL DEVELOPMENT

Use of mentors: Ask to be paired with a more experienced team member to provide insight and guidance on planning and task management.

Upgrading knowledge: Ask for training on using the latest tools and stay up to date with industry advances. Look for relevant training that will improve your skillset.



Check out [Specialised Learning courses](#) to help you further develop in these skills



DIGITAL CAPABILITY AND INNOVATION

What is it?

- Using technology and other digital solutions to enhance performance.
- Improving technical confidence.
- Implementing views and access to systems at appropriate levels.
- Critically evaluating new technology to inform decision-making.
- Embracing change enabled by digital tools.

Key attributes of the skill

- Automates repetitive processes.
- Manages tasks more effectively using technology.
- Enhances decision-making and analysis.
- Solves problems in a more agile and efficient way.
- Helps in risk analysis and fraud detection.

You need to assess your own proficiency in the area of digital capability and innovation – look at the questions below to give you an indication of where your proficiency level currently lies.

You will need to provide clear examples and evidence to your employer to support your self-assessment of your proficiency level.

Proficiency Level	Self-assessment questions
Accomplished	<ul style="list-style-type: none"> • Do you consistently show understanding of digital tools, and consider your strengths and weaknesses in carrying out tasks? • Can you articulate and help others in your use of digital resources – assist with change and adapting? • Can you give examples where you have suggested new or different technologies to benefit efficiencies or achieve goals in a better way?
Experienced	<ul style="list-style-type: none"> • Do you openly try new technology to understand capabilities and limitations? • Do you look for better solutions to improve processes and quickly adapt to change? • Do you ask appropriately pitched questions to access support quickly when needed?
Aware	<ul style="list-style-type: none"> • Can you explain why digital capability and innovation is important? • Do you use workplace digital tools effectively? • Do you give new tools/systems a go but ask for help at the right point?



DEVELOPING DIGITAL CAPABILITY AND INNOVATION

Developing digital capability and innovation, especially in connection with leadership, involves creating a culture that embraces change; experimenting with new technologies to drive efficiencies and better solutions. Here are some practical ways you can foster digital capability, innovation and leadership in your workplace:

1. USE TECHNOLOGY IN DAY-TO-DAY TASKS

Use of digital tools: Use technology as the default for communication and the analysis/presentation of data. Get easy access to relevant tools and learn by doing – practise offline/watch tutorials/access online guides and videos.

Watch and learn: Can you watch colleagues using these digital tools? You will learn how to access different tools and how to navigate them quickly and efficiently. Incorporate shared documents and live dashboards into meetings.

2. CHALLENGING PROCESSES

Ask questions: Ask why something is done the way it is. Experiment first. Don't be afraid to try new things and make suggestions.

Propose better solutions: If you have other ideas – speak up. Think about whether there are smarter, more efficient ways of working to improve processes and outcomes?

3. SHARING SOLUTIONS

Forums or Teams channels: Are there accessible ways to share common “pain points”? It is likely that others may have already faced the issue and have a solution to share.

Knowledge sharing: Do you have a neat solution to a given problem? Are there ways to enable solutions to be shared across the business, so others may benefit from it? If you've figured something out that helped you, there's a good chance it will help someone else – share it!

4. DIGITAL CHAMPIONS

Shadowing: Ask to shadow colleagues who use digital tools effectively. Offer others to shadow you if you confidently use digital tools.

Digital habits: Attend drop-in sessions provided by digital champions to hear about new ways of working and share knowledge. Suggest the use of “digital tip of the week” to expand digital capabilities.

5. ONGOING TRAINING

Stay updated on digital trends: Regularly read short articles, blogs, or videos about workplace technology. Be curious and explore new tools.

Dedicate time for learning: Make time for learning to ensure that you stay ahead – continuous learning. Use different sources of learning – workshops, online courses, short videos and learning from each other.



Check out [Specialised Learning courses](#) to help you further develop in these skills



DEVELOPING SELF

What is it?

- Becoming a better version of yourself.
- Continuously learning new skills.
- Seeking opportunities to grow personally and professionally.
- Building self-awareness and personal responsibility.
- Improving your mindset and behaviours.

Key attributes of the skill

- Focused career development and progression.
- Enhances relationships and improves self-governance.
- Increases job satisfaction, motivation and fulfilment.
- Improves knowledge, efficiency and productivity.
- Fosters adaptability, resilience and confidence.

You need to assess your own proficiency in the area of developing self - look at the questions below to give you an indication of where your proficiency level currently lies.

You will need to provide clear examples and evidence to your employer to support your self-assessment of your proficiency level.

Proficiency Level	Self-assessment questions
Accomplished	<ul style="list-style-type: none"> • Do you consistently take on tasks outside your comfort zone to progress your own development? • Do you actively stay up to date, seeking opportunities to improve and proactively ask for feedback on your performance? • Do you have a clear plan for your own career path, including the steps and development needed to get there?
Experienced	<ul style="list-style-type: none"> • Can you think of situations where you have been able to do a better job through learning new skills? • Do you have a questioning mindset to improve knowledge and understanding? • Do you ask for feedback, and both acknowledge and act on areas for improvement?
Aware	<ul style="list-style-type: none"> • Can you explain why 'developing self' is important? • Do you volunteer and take on new experiences and challenges? • Do you ask for help to complete a task or wait to be asked?



DEVELOPING DEVELOPING SELF

Developing self, especially in connection with leadership, involves creating a culture of self-reflection, growth and accountability, together with a focus on continuous learning, strengthening capabilities and leading by example. Here are some practical ways you can foster developing self and leadership in your workplace:

1. CONTINUOUS LEARNING

Learning-friendly environment: Attend regular learning events such as “Lunch and Learn” workshops, or suggest they are set-up if they are not already in place.

Use available resources: Make time for hands-on training, online courses, videos, books and access Specialised Learning courses.

2. DEVELOPMENT ROADMAPS

Use personal development plans: Keep track of your own development between six-monthly review conversations. Identify your strengths and areas for improvement. Track progress against goals and regularly ask for feedback.

Set career goals: Set career goals: What are your aspirations beyond becoming a qualified ACA? Are you on track to get there? What additional skills do you need to develop?

3. SEEK TRAINING

Sharing: Openly engage in your own growth journey. Talk about your own goals and what you are working on. Ask colleagues about theirs and provide support and encouragement. Offer each other feedback.

Participate: Join learning events, training and courses with the rest of the team – embrace the team development. Be open to suggestions on training that will benefit you.

4. SKILLS BUILDING

Growth opportunities: Seek opportunities for “stretch tasks” to push you beyond your current level. Ask for support and mentoring to enhance the practical learning.

On-the-job learning: Ask to shadow colleagues who are at the next level to you to understand expectations. Ask to rotate across teams and departments, if possible, to broaden skillsets and knowledge base. Ask questions from more experienced colleagues to broaden your knowledge.

5. DON'T FORGET THE “SOFTER” SKILLS

Interconnected behaviours: Think about other competencies and skills and how they interconnect. Can you develop softer skills such as emotional intelligence, self-awareness, resilience and confidence? Balance your learning between technical skills and knowledge with softer skills, for example, adapting plans when goals change while remaining calm and controlled.

Have a growth mindset: Remember that challenges are opportunities to improve and move forward. Maintain a positive outlook, with belief in your potential.



Check out [Specialised Learning courses](#) to help you further develop in these skills



DEVELOPING OTHERS

What is it?

- Identifying and nurturing talent.
- Providing feedback and coaching to foster improvement.
- Supporting skills development and aspirations.
- Offering opportunities to build new expertise.
- Investing in people.

Key attributes of the skill

- Creates a culture of continuous learning.
- Builds stronger, more competent teams.
- Improves employee engagement, retention and job satisfaction.
- Develops performance management and mentoring skills.
- Builds capability and empowers growth.

You need to assess your own proficiency in the area of developing others – look at the questions below to give you an indication of where your proficiency level currently lies.

You will need to provide clear examples and evidence to your employer to support your self-assessment of your proficiency level.

Proficiency Level	Self-assessment questions
Accomplished	<ul style="list-style-type: none"> • Do you actively create opportunities to build confidence and growth in others while successfully delivering outcomes? • Do you provide support and guidance to others, even when under pressure? • Can you give examples of how you have mentored and coached others to progress and improve?
Experienced	<ul style="list-style-type: none"> • Do you provide constructive, actionable feedback when reviewing the work of other team members? • Do you openly share knowledge and collaborate to help others succeed? • Do you delegate tasks with learning in mind?
Aware	<ul style="list-style-type: none"> • Can you explain why developing others is important? • Can you describe scenarios where you have helped colleagues to understand day-to-day tasks and key processes? • Do you take the time to share your learning with your peers?



DEVELOPING DEVELOPING OTHERS

Developing others, especially in connection with leadership, involves creating a culture of continuous learning, where everyone is encouraged to share knowledge, challenge themselves, learn and grow, within a supportive environment where achievements are celebrated together. Here are some practical ways you can foster developing others and leadership in your workplace:

1. HIGHLIGHT OPPORTUNITIES TO IMPROVE

Pay attention: Can you identify someone's interests and strengths? This insight can be used to align tasks and learning opportunities.

Look for "stretch tasks": Support team members in recognising when someone is capable of more; pushing them carefully out of their comfort zones to move towards reaching their full potential.

2. SHARING KNOWLEDGE

Shadowing: Facilitate learning from one another. Offer for more junior colleagues to shadow you. Be proactive in helping others expand their knowledge. Explain how and why you did things the way you did.

Offer training sessions: Step up and volunteer to present updates and briefings, sharing your knowledge and building your confidence.

3. HAVE ONGOING DIALOGUE

Frequent catch-ups: Put frequent check-ins with your direct reports using 1:1s and wider group discussions. Touch points should be on a regular basis rather than limited to formal annual and bi-annual reviews – part of the process for continuous development.

Reinforce development: Position the check-ins as an opportunity to look at progress and support skill building. What is going well? What do junior team members need help with? Look at how this fits with their personal development plan.

4. COACHING AND MENTORING

Use coaching within the team: Encourage junior colleagues to ask questions, actively listen and think about solutions, rather than offering answers. Ask: "What are the options?" "Why do you think that?"

Use mentors or a buddy system: Mentor more junior colleagues or offer to buddy up with others. This provides support and guidance, and an informal way to share experiences. Can help with building resilience.

5. MAKE DEVELOPING OTHERS A PRIORITY

Be people-focused: Remind colleagues that they are the most valuable asset. Consider ways to improve well-being alongside development. Make development a shared responsibility.

Build in time to support others: Build time into workplans and projects to allow for guiding someone else. Get buy-in from senior management to allow this to happen – make it part of your development and that of your junior colleagues.

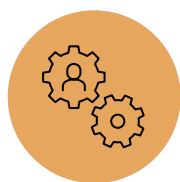


Check out [Specialised Learning courses](#) to help you further develop in these skills



PROFESSIONALISM





PROFESSIONALISM TOOLKIT

Professionalism is our attitude, conduct and behaviour.

The five key skills of professionalism are:

ACCOUNTABILITY	RELIABILITY	SELF REVIEW	PROFESSIONAL JUDGEMENT	PROFESSIONAL SCEPTICISM
<p>Taking responsibility for your actions, decisions and consequences.</p> <p>Being accountable and acting morally builds trust.</p> <p>Being dependable and consistent.</p> <p>Taking ownership.</p>	<p>Consistently performing to an expected standard.</p> <p>Trusted to do what has been asked - dependable.</p> <p>Recognises and communicates limitations.</p>	<p>The ability to step back to evaluate personal performance and behaviour.</p> <p>Critically appraise performance for continual improvement.</p> <p>Set and evaluate progress against goals.</p> <p>Encourages personal responsibility.</p>	<p>The application of professional knowledge and experience to derive appropriate resolutions within prescribed standards, ethics and objectives.</p>	<p>Maintaining a questioning mindset, critically assessing evidence, and being alert to risks such as errors and fraud.</p> <p>Not accepting information at face value, taking time to assess and seek verification.</p>



The following pages show you how to assess yourself in each of these areas, as well as providing you with practical ideas on how to develop each skill in the workplace.



ACCOUNTABILITY

What is it?

- A willingness to accept responsibility and ownership of your actions, decisions and outcomes.
- Owning your behaviour.
- Being transparent and open in communication.
- Being answerable to others for what you do.
- A commitment to meet expectations.

Key attributes of the skill

- You focus on completing tasks and goals to deadlines and standards.
- You take ownership of your decisions whatever the outcome.
- You are open and honest about progress, challenges and mistakes.
- You are able to accept feedback and recognise consequences.
- You always act ethically and within the rules.

You need to assess your own proficiency in the area of accountability – look at the questions below to give you an indication of where your proficiency level currently lies.

You will need to provide clear examples and evidence to your employer to support your self-assessment of your proficiency level.

Proficiency Level	Self-assessment questions
Accomplished	<ul style="list-style-type: none"> • Do you commit to team decisions and reflect on both achievements and mistakes? • Do you proactively address challenges to help prevent bigger issues, while maintaining high standards of accuracy and professionalism? • Can you give examples of owning a situation and working towards a solution when things are not going to plan?
Experienced	<ul style="list-style-type: none"> • Do you explain your actions and accept feedback, learning from mistakes? • Do you manage expectations and keep stakeholders updated on timelines and progress? • Do you clearly define roles and responsibilities in teamwork?
Aware	<ul style="list-style-type: none"> • Can you explain why accountability is important? • Do you complete assigned tasks accurately and on time without being reminded? • Do you avoid excuses and admit mistakes?



DEVELOPING ACCOUNTABILITY

Developing accountability, especially in connection with professionalism, involves setting clear expectations, modelling integrity and encouraging ownership of work. Here are some practical ways you can foster accountability and professionalism in your workplace:

1. CLEAR EXPECTATIONS

Have defined roles, responsibilities and expectations:

Do you know who is doing what? Do you know what success looks like? How will they be measured? Clarify your understanding and expectations upfront.

Foster “buy-in”: Get involved in the early stages of planning. Know the vision and plan and what implementation looks like. Be engaged in the process.

2. SET PERSONAL STANDARDS

Challenge yourself: Question whether you are doing your best work. Take pride in what you are doing. Can you add value? What could be improved?

Self-discipline: Always perform to the best of your ability, even if no one is watching. Stay focused and remain engaged throughout a task or project, avoid being distracted. Be proactive, rather than waiting to be asked. Finish what you start.

3. AGREED TIMELINES AND SPECIFIC DEADLINES

Be realistic: Check that timelines are realistic and achievable, if they are not, question them. Deadlines need to be agreed for you to be accountable to them. Goals need to be achievable while encouraging you to push performance without compromising accuracy.

Use smaller milestones: Ask for tasks to be broken down into smaller units to make large tasks and projects more manageable and easier to track progress. Consider using “sprints” – mini-projects within a larger project, being focused, short and with a clear goal.

4. TAKE OWNERSHIP OF MISTAKES

Acknowledge errors: Own up to mistakes – addressing issues head on, without fear of blame. Learn from them and don’t make excuses, assess why they happened and how they can be avoided in future. What could be done differently?

Learn from mistakes: Ask for feedback and use it to develop. Use mistakes as part of your active learning and set goals. Look for measurable ways to improve, focusing on solutions.

5. TEAM ACCOUNTABILITY

Hold each other accountable: Openly discuss responsibilities, ask for help, raise concerns and give reminders. Show that you are engaged and accountable for your actions but expect others to be accountable for their actions.

Track progress: Use collaborative platforms and management tools eg, dashboards, task boards and checklists to improve transparency. Double check that you know your responsibilities and deadlines. Use regular check-ins – consider daily scrum meetings.



Check out [Specialised Learning courses](#) to help you further develop in these skills



RELIABILITY

What is it?

- Can be consistently counted on by others.
- Being dependable.
- Following through on commitments.
- Caring about doing things properly.
- Being trustworthy in actions and interactions.

Key attributes of the skill

- You manage your time effectively.
- You consistently meet expectations.
- You focus on accuracy and attention to detail.
- You consistently fulfil team and individual responsibilities.
- You have a reputation of being trustworthy.

You need to assess your own proficiency in the area of reliability – look at the questions below to give you an indication of where your proficiency level currently lies.

You will need to provide clear examples and evidence to your employer to support your self-assessment of your proficiency level.

Proficiency Level	Self-assessment questions
Accomplished	<ul style="list-style-type: none"> • Do you stay dependable and aligned to priorities, even when workloads and pressures are high? • Do you onboard and train new team members, based on proven trust from organisation leaders? • Can you manage complex or high-priority assignments?
Experienced	<ul style="list-style-type: none"> • Can you show examples of being able to balance multiple priorities and maintain a consistent standard of work? • Can you be counted on to deliver your part of teamwork/projects? • Do you have examples of communicating proactively to highlight problems and risks to timelines, suggesting possible solutions?
Aware	<ul style="list-style-type: none"> • Can you explain why reliability is important? • Do you take pride in delivering high-quality work on time? • Do you arrive on time and come prepared?



DEVELOPING RELIABILITY

Developing reliability, especially in connection with professionalism, involves creating a culture where commitments, communication and quality are valued and upheld. Here are some practical ways you can foster reliability and professionalism in your workplace:

1. ENCOURAGE TIME MANAGEMENT AND ORGANISATION

Set clear priorities: Do you know what the priorities are? Are there realistic deadlines? Plan your time effectively to improve reliable output – deadlines and accuracy. Smart planning is key to reliability. Look at your workload and learn not to over-commit.

Promote the use of planning tools: Use digital tools such as calendars, task lists and time trackers. Share planners to support team workflows and improve productivity.

2. CREATE OPPORTUNITIES

Take ownership: Volunteer to step up and “have a go” in low-risk situations. Take the initiative, don’t wait to be asked.

Follow through: Honour commitments and uphold high standards. Track progress and keep stakeholders informed of progress. Identify when things go wrong, learn from them rather than ignoring them.

3. BUILD IN QUALITY ASSURANCE

Check your work: Check the accuracy and completeness of your work. Don’t rush to get ahead and then under-deliver.

Deliver consistent standards: Are you clear what the expectations are? Know the deadlines and understand the deliverables. Establish guidelines with your manager so performance can be measured and benchmarked across the team.

4. COMMUNICATE CLEARLY

Communicate early if something changes: If anything happens which may affect your, or the team’s, ability to meet commitments, communicate it as early as possible. Be proactive, don’t assume that someone else will do it or the stakeholder already knows.

Manage expectations: Set realistic goals and be clear about timelines. Provide regular updates. Clarify who is responsible for what.

5. BUILD A REPUTATION OF BEING DEPENDABLE

Be punctual: Manage your time effectively – show up on time, submit work on time and respond to messages in a timely manner. Plan ahead and prioritise tasks.

Do what you say you are going to do: Complete tasks that you have committed to – always follow through, without over-committing. Be aware of your commitments and time pressure. Say up front if you can’t do it. Manage your workload and consistently deliver, rather than over-promising further down the line. People respect honesty and integrity.



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SELF REVIEW

What is it?

- A personal evaluation of your own performance, skills and progress.
- Being honest with yourself.
- A reflection on strengths and areas for improvement.
- A benchmark for future growth and development.
- An opportunity to have a voice in your own evaluation.

Key attributes of the skill

- You reflect on work quality and output.
- Helps to promote a mindset of ongoing learning.
- You show personal accountability and ownership.
- Helps managers to understand your perspective and ambitions in performance appraisals.
- Supports alignment with organisational objectives.

You need to assess your own proficiency in the area of self review – look at the questions below to give you an indication of where your proficiency level currently lies.

You will need to provide clear examples and evidence to your employer to support your self-assessment of your proficiency level.

Proficiency Level	Self-assessment questions
Accomplished	<ul style="list-style-type: none"> • Do you reflect on how your actions affect others when leading or guiding teams? • Can you give examples of where you have mentored and supported others in your development? • Do you consider the impact of your work on the wider business objectives?
Experienced	<ul style="list-style-type: none"> • Do you look at yourself critically, giving examples of situations where your performance was good or you could have done better? • Do you encourage upward feedback from team members and can you demonstrate where you have acted on this? • Do you have a plan for your own career path, showing a commitment to personal growth?
Aware	<ul style="list-style-type: none"> • Can you explain why self review is important? • Can you give examples showing how you have learnt and grown from mistakes? • Do you identify knowledge gaps and seek appropriate training?



DEVELOPING SELF REVIEW

Developing self review, especially in connection with professionalism, involves fostering a culture of honest reflection, personal responsibility and professional growth. Here are some practical ways you can foster self review and professionalism in your workplace:

1. TIME FOR REFLECTION

Dedicated time: Allow time for reflection and self-analysis at the end of tasks/projects. Use quiet spaces or go for a walk to provide uninterrupted reflection time.

Documentation of thoughts: Use templates for journalling to provide focused reflection. Use physical journals or notebooks; or digital notes and apps – it's a personal choice. Documenting your thoughts will clarify thinking, highlight patterns and track your personal growth.

2. CONSIDER PROFESSIONAL BEHAVIOUR

"Am I behaving like a future qualified accountant?": What does professional behaviour look like? Are you demonstrating these skills? Seek feedback. "How can I improve?"

Being aligned with professional standards and expectations: Look at current behaviour objectively – reflect and take feedback. Identify areas for improvement and set behavioural goals. Use role models. Track progress for improvement.

3. PROFESSIONAL DEVELOPMENT REVIEW

Use prompts: Look at reflection questions – "What did I do well?" "What did I find difficult?" "Why?" "What can I do better next time?" Ask hard, unbiased questions.

Connect to goals: How will self review help towards achieving career objectives? By understanding your strengths and areas for development you can set clear actions for growth towards your long-term career goals.

4. MAKE A PART OF EVERYDAY CULTURE

Positive tool for growth: Your development is your own responsibility – take ownership. Self-reflection should be an integral part of work debriefs.

A safe space: Are you able to admit mistakes without judgement? Do you feel comfortable to have open discussions with your team that allow reflection and development conversations?

5. STRUCTURE

Use of templates: Consider using a standard template to provide structure to your review. This will focus on your wins and what you need to work on. Templates allow you to be more objective rather than being defensive or overly critical.

Use open questions: Ask yourself "What went well and why?" "What did I find difficult?" "How do I compare with my peers?" "What would I do differently next time?"



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PROFESSIONAL JUDGEMENT

What is it?

- Using your knowledge and expertise to address the situation.
- Drawing on experience to guide current decisions.
- Ensuring actions align with professional codes of conduct.
- Taking into account the specific context to inform choices.
- Evaluating all the options to choose the most appropriate course of action.

Key attributes of the skill

- You make informed and ethically sound decisions.
- You are able to balance the differing interests of stakeholders.
- You provide a clear interpretation of policies and standards.
- You make clear evaluations of risks and materiality.
- Can help with planning and prioritisation.

You need to assess your own proficiency in the area of professional judgement – look at the questions below to give you an indication of where your proficiency level currently lies.

You will need to provide clear examples and evidence to your employer to support your self-assessment of your proficiency level.

Proficiency Level	Self-assessment questions
Accomplished	<ul style="list-style-type: none"> • Do you encourage colleagues and junior team members to approach you for guidance and advice? • Do you have examples of making ethical decisions, involving risk, ambiguity or competing interests? • Can you give examples of where you have interpreted accounting standards in complex financial scenarios?
Experienced	<ul style="list-style-type: none"> • Can you balance conflicting demands, demonstrating sound reasoning and impartiality? • Do you consult with peers and more experienced colleagues when unsure about the implications of a decision? • Do you have examples of where you have questioned financial data due to inconsistencies or anomalies?
Aware	<ul style="list-style-type: none"> • Can you explain why professional judgement is important? • Can you describe scenarios you have seen where there were no clear answers – how was a decision made? • Do you understand your limitations and when you should ask for help?



DEVELOPING PROFESSIONAL JUDGEMENT

Developing professional judgement, especially in connection with professionalism, involves creating an environment where you can build the skills, confidence and ethical awareness needed to make sound decisions. Here are some practical ways you can foster professional judgement and professionalism in your workplace:

1. REAL EXPERIENCE

Get involved in decision-making: Ask to be involved in low-risk judgemental areas. Research options and draft recommendations based on your research and application of professional judgement.

Decision-making: Ask to be involved in decisions that require interpretation, prioritisation or ethical considerations.

2. MENTORSHIP AND ROLE-MODELLING

Shadowing: Ask to sit in on client meetings. This will provide you with practical, first-hand experience of handling interpersonal dynamics, communication skills, ambiguity and ultimately professional decision-making.

Having a mentor: Ask for a mentor to be assigned to you who is more senior so they can demonstrate consistent, professional judgement.

3. GROUP DISCUSSIONS

Collaborative learning: Encourage colleagues to share experience and expertise. Debate different scenarios with ethical deliberation, thinking about alignment with professional standards and values. Seek a second opinion when you are unsure.

Multiple perspectives: Seek views from colleagues at all levels to gain multiple insights. Stay open minded in team discussions – this builds a shared standard of professionalism, broadens thinking and reduces bias.

4. USE OF PROFESSIONAL STANDARDS

Use as a starting point: Professional standards provide the foundational principles and structured guidance, establishing the framework for decision-making. Apply the relevant standards as the basis for navigating uncertainty.

Applying judgement: Think about how and why certain decisions were made – can you present those decisions back as a professional interpretation within the boundaries of established standards?

5. RECOGNISE GOOD JUDGEMENTS

Sound decision-making: Identify where a team member has made a well-considered decision, especially in difficult or uncertain situations and recognise the judgement made and why.

Ethical integrity: Balance decision-making with professional judgement and integrity. Discuss the ethical considerations in decision-making.



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PROFESSIONAL SCEPTICISM

What is it?

- Having a questioning mindset.
- Critically assessing evidence.
- Staying vigilant for discrepancies or errors.
- Validating information rather than accepting it at face-value.
- Persistence in following up inconsistencies.

Key attributes of the skill

- Strengthens the credibility and integrity of regulatory reporting.
- It helps you to detect fraud and prevent errors.
- Leads to enhanced public trust.
- Supports your objective and independent thinking.
- Helps you in considering risk and underlying problems.

You need to assess your own proficiency in the area of professional scepticism – look at the questions below to give you an indication of where your proficiency level currently lies.

You will need to provide clear examples and evidence to your employer to support your self-assessment of your proficiency level.

Proficiency Level	Self-assessment questions
Accomplished	<ul style="list-style-type: none"> • Do you promote a culture encouraging your team to speak up and challenge reasoning without judgement? • Do you have examples where you have respectfully questioned the decisions of senior colleagues or stakeholders? • Do you consult with colleagues in high risk or complex situations to benefit from differing perspectives and identify blind spots?
Experienced	<ul style="list-style-type: none"> • Can you describe situations where you have identified discrepancies or issues by questioning evidence? • Do you follow up when answers are unclear or don't add up, being mindful of potential red flags? • Do you avoid making decisions and judgements until you have all the information to hand?
Aware	<ul style="list-style-type: none"> • Can you explain why professional scepticism is important? • Can you give examples where you have highlighted or escalated something that didn't seem quite right? • Do you readily ask questions to clarify your understanding of concepts and situations?



DEVELOPING PROFESSIONAL SCEPTICISM

Developing professional scepticism, especially in connection with professionalism, involves creating a culture of critical thinking, questioning assumptions and evidence-based decision-making. Here are some practical ways you can foster professional scepticism and professionalism in your workplace:

1. HAVE A QUESTIONING MINDSET

Ask questions: "Does it make sense?" "What evidence is there?" "Is there an alternative way to look at this?" "What if?"

Challenge: Question information or decisions, whether with colleagues or stakeholders, at all levels. Learn how to question in a respectful and professional manner without creating confrontation. It is OK to challenge management assumptions.

2. MAKING CONNECTIONS

Link information: Look at data and evidence in a wider context, not in isolation. Step back and consider the bigger picture to understand how the pieces may, or may not, link together.

Use existing knowledge: "What has happened in the past?" "Are there patterns?" "What do you already know?" This provides a starting point.

3. BUILD SELF-CONFIDENCE

Training: Look for training in how to interview with a probing and curious mindset. This will help you to feel more confident asking questions. Professional scepticism may not be instinctive.

Having a mentor: Ask for a mentor to be assigned to you who is more senior, so they can challenge and guide you in your critical thinking – making you think beyond what is in front of you.

4. DOCUMENT EVIDENCE

Use checklists: Checklists are a good learning tool to guide questioning, reinforce consistency and promote critical thinking. If you use them consistently they can help to support your reasoning, especially in high pressure situations.

Create an audit trail: Maintain detailed records showing how you reached conclusions – based on evidence, assumptions, risks and aligned with professional standards.

5. BE MINDFUL OF FAMILIARITY

Stay alert: Remain curious, adopting an objective, evidence-based approach as opposed to one based on trust and routine.

Team rotation: Suggest switching team members around to avoid complacency when processes and people are well-known. This will help you to bring a fresh perspective and reduces your bias. Continue to ask questions even if you think you know the answer.



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* includes parent companies. Source: ICAEW member data
March 2025, Interbrand, Best Global Brands 2024