PROFESSIONAL SKILLS

AUTHORISED TRAINING
EMPLOYER GUIDE

ICAEW

CONTENTS

INTRODUCTION

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

Professional skills will equip students with the ability to handle the variety of different situations they will encounter throughout their career. The ACA features 25 professional skills split across five key competency areas. A three-stage proficiency model will guide students to develop their unique skills portfolio, supported by you as their employer as part of their regular six-monthly review meetings.

Development is unique to each individual and their experience. Nurture and celebrate this, while identifying opportunities for further development.

Use this guide to help you, as the employer, to have effective and compassionate development conversations with your students along their journey.

There are minimum requirements for membership, but, as an employer, we also encourage you to explore and celebrate your student's strengths, focus on looking forward and seeking support for areas they need to develop further.

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 students' professional development.

→ Empower employers to hold holistic and valuable development conversations with students.

→ Encourage lifelong learning and development, by helping students and employers to identify development opportunities and supporting them with relevant resources.

→ Complement apprenticeships by improving alignment with apprenticeship standards and removing duplication.

PROFESSIONAL SKILLS FRAMEWORK

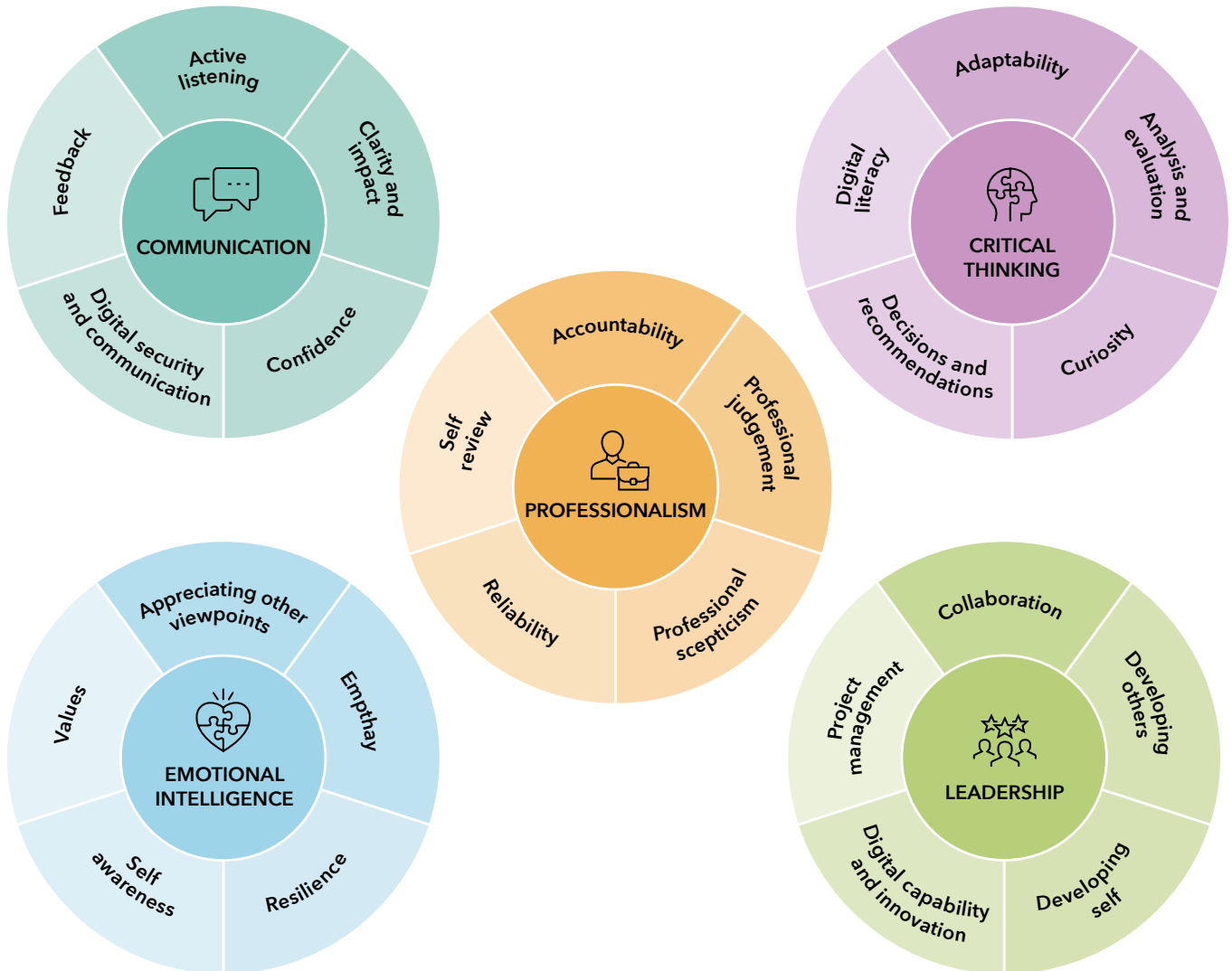**PROFESSIONAL SKILLS AND EXPERIENCE** > PROFESSIONAL SKILLS
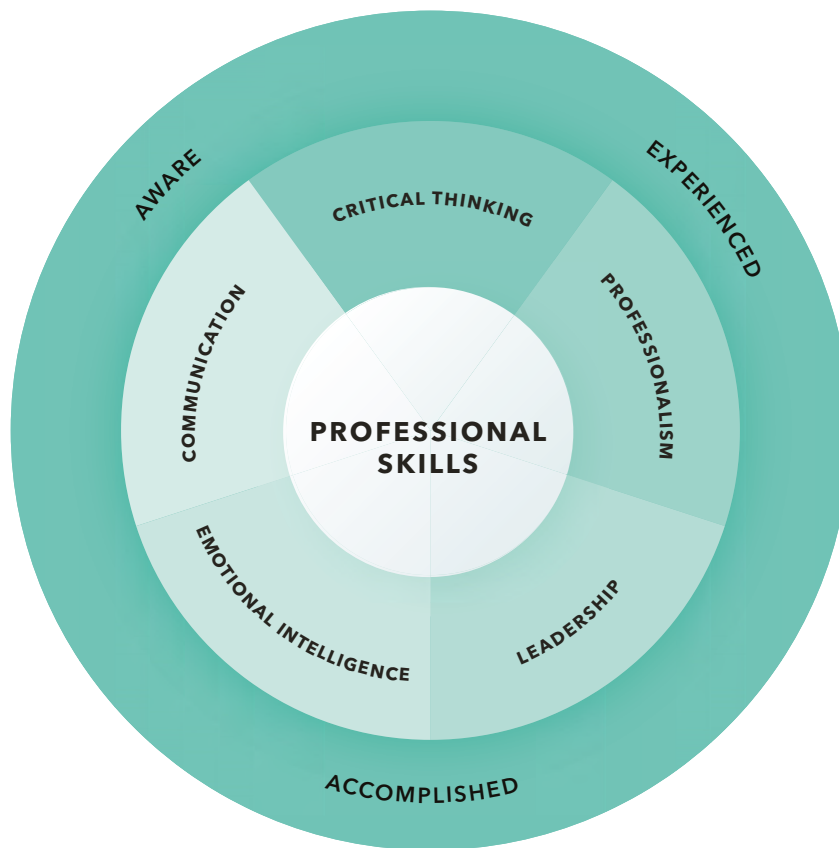
Professional skills are the behaviours, attributes and personal qualities that enable individuals to effectively interact, collaborate and contribute in the workplace. These skills are critical for building relationships, adapting to change and solving problems.

Developing professional skills in the workplace helps to improve communication and collaboration while fostering leadership and decision-making abilities. In addition, they help students manage their 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

As a student moves towards membership, you as their employer, work with them to offer professional work experience to enable the development of these professional skills. As part of this development journey there should be regular progress conversations, at least every six months, where together you will assess progress. This toolkit will assist you in asking the right questions, making sure that the student has the opportunity to develop further. This competency framework is structured around the core professional skills and focuses on continual development and highlighting the importance of the 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, reducing confusion, valuing different opinions and perspectives, and showing 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 a student is moving away from being directed to directing others, is transitioning from doing tasks to managing outcomes and rather than providing data can deliver insights and provide strategic value.

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

Flexibility on progression and coverage of skills provides students with a unique learning journey. However, all students 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.

Each student will have a clear idea about their strengths and development areas. They will use development ideas from this toolkit, focused workplace experience and Specialised Learning resources to help them to develop further before their next review. These reflect conversations will be where you, as the employer, and your student can set out areas that will be focused 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 for our members.

Proficiency Level	Description	Requirement
Accomplished	• 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	• 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	• 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 their effectiveness; and • 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

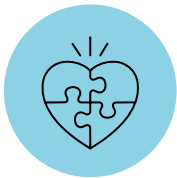The following section looks at each of the five competency areas and the professional skills within it. Explaining what the skills are, how as an employer you can effectively assess each skill, what to look out for at each proficiency level and finally providing practical development ideas in the workplace.

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

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

ASSESSING ACTIVE LISTENING

Use the guides provided here to help assess your students' proficiency level in the skills area of active listening as part of communication.

What is it?	Key attributes of the skill
• 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.	• Builds trust and emotional engagement – being valued. • Prevents misunderstandings. • Enhances relationships and develops respect. • Fosters more meaningful, open conversations. • Leads to better decision-making and resolution of differences.

Use the example questions below to help guide your discussions with students, adapting and expanding on them as needed.

You should expect students to provide clear examples and evidence of feedback before determining the proficiency level.

Proficiency Level	Examples
Accomplished	• Do they ask insightful and relevant questions in an empathetic way that encourages discussion and decision-making? • Do they encourage quieter team members to contribute and share their thoughts? • Do they take forward and act on what is being said?
Experienced	• Do they support junior colleagues by showing patience and acknowledging their concerns? • Do they openly acknowledge (nodding and direct eye contact) and validate colleagues' contributions in meetings? • Do they listen without interrupting, even during emotive discussions?
Aware	• Can they explain why active listening is important? • Do they ask questions if they have not fully understood what is being said? • Do they give their full attention during meetings and updates?

DEVELOPING ACTIVE LISTENING

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

1. CREATE AN ENVIRONMENT WHERE PEOPLE FEEL HEARD

Don't judge: Promote curiosity and interest. Encourage questions to find out more. Foster understanding and acceptance, even when individuals disagree. Be mindful of body language, from both sides.

Create a safe space: Facilitate full attention by discouraging distractions such as phones and other devices during meetings. Avoid any multitasking and encourage empathetic responses to demonstrate understanding. This is particularly important in virtual meetings.

2. PROVIDE ROLE-RELEVANT OPPORTUNITIES

Summarising: Ensure clear understanding of client, colleague and stakeholder expectations and responses to questions by recapping verbally and in supporting documents. Encourage objective information gathering.

Team working/projects: Set clear expectations and regular check-ins where everyone's voice is heard. Foster mutual respect, trust and shared understanding, where all members feel that their viewpoints are considered.

3. BE MINDFUL OF TEAM BEHAVIOURS AND FEEDBACK

Understanding team needs: Build awareness of team dynamics and challenges through thoughtful listening and respectful dialogue, without pre-assumptions. Support two-way dialogue to improve communication.

Encourage more meaningful performance reviews and feedback: Allow space and time for trainees to share their thoughts without interrupting. Equally they should do the same. Do they take on board constructive, thoughtful feedback, learn and improve, without being defensive?

4. PROVIDE PRACTICE

Shadow colleagues: Provide opportunities 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.

Rotate responsibilities for leading meetings: Provide opportunities to enhance engagement skills and adapt to alternative communication styles. Strengthen team dynamics by rotating the responsibility to take notes/minutes and summarise what has been said. Encourage interactive meetings.

5. IDENTIFY KEY POINTS AND PRIORITIES

Explain to others: Ask individuals to present or clarify to someone else, as this both encourages them to listen properly and to consolidate their own understanding.

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

Check out Specialised Learning courses to help develop your students further in these skills

ASSESSING CLARITY AND IMPACT

Use the guides provided here to help assess your students' proficiency level in the skills area of clarity and impact as part of communication.

What is it?	Key attributes of the skill
• 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.	• Offers thoughtful, relevant and persuasive input to support good decision-making. • Avoids misunderstandings, confusion and possible conflict. • Writes well-structured, easy to follow reports, emails and other forms of communication. • Explains the same point in different ways to aid understanding and trust. • Avoids ambiguity and confusion.

Use the example questions below to help guide your discussions with students, adapting and expanding on them as needed.

You should expect students to provide clear examples and evidence of feedback before determining the proficiency level.

Proficiency Level	Examples
Accomplished	• Do they deliver reports and updates to senior colleagues, focusing on the key areas to drive action? • Do they provide concise and meaningful feedback to junior colleagues, helping them to improve their own work? • Do they provide clear direction for junior team members, so that deadlines are met and errors minimised?
Experienced	• Can they provide examples showing how they were able to communicate information in different ways to adapt to the audience? • Do they have examples to show how they have presented data in a meaningful way to drive decisions? • Do they set out clear objectives to avoid ambiguity and recap on the what, why, how and what next?
Aware	• Can they explain why clarity and impact is important? • Can they express themselves in ways that others understand? • Do they present data in a simple and structured way?

DEVELOPING CLARITY AND IMPACT

Developing clarity and impact in your team, 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: Have proforma templates and checklists for standard work, reports, letters etc. Make them easily accessible so everyone knows where to find them.

Structure and label files and papers: Encourage 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: Show your team how 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: Ensure your team know and understand exactly what is expected of them 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: Promote a focus on evidence, not speculation or personal opinions. This approach will build trust, credibility and aid effective decision-making.

5. MENTORSHIP AND FEEDBACK

Facilitate coaching: Use senior team members to support their juniors by offering structured guidance and instruction in presenting information effectively and clearly, emphasising key messages and tailoring content/delivery. Giving ongoing, constructive direction will lead to a better end result.

Develop through review: "What have they done well?" "Where and how could they improve?" Give the opportunity to ask questions and check understanding.

Check out Specialised Learning courses to help develop your students further in these skills

ASSESSING CONFIDENCE

Use the guides provided here to help assess your students' proficiency level in the skills area of confidence as part of communication.

What is it?	Key attributes of the skill
• 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.	• Communicates and expresses ideas clearly and assertively. • Willing and able to make decisions without constant validation. • Takes initiative in undertaking tasks without being asked. • Remains calm when put on the spot or questioned. • Steps outside their comfort zone to take considered risks.

Use the example questions below to help guide your discussions with students, adapting and expanding on them as needed.

You should expect students to provide clear examples and evidence of feedback before determining the proficiency level.

Proficiency Level	Examples
Accomplished	• Do they consistently make informed decisions independently, using professional judgement and without needing ongoing reassurance? • Do they respectfully voice concerns over ethical issues, discrepancies and questionable decisions, irrespective of position? • Are they respected and trusted by colleagues and stakeholders through consistently demonstrating self-assured professionalism?
Experienced	• Can they explain information to colleagues and stakeholders clearly and persuasively? • Do they have examples where they have shown initiative without waiting for direction? • Do they stand by their decisions, even under pressure and are willing to admit being wrong or uncertain?
Aware	• Can they explain why confidence is important? • Do they have examples where they have volunteered to explore new things? • Do they proactively speak up and ask questions?

DEVELOPING CONFIDENCE

Developing confidence in your team, especially in connection with communication, involves creating a supportive environment where team members feel trusted and heard, 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: Create opportunities for your team to gain knowledge and develop greater expertise, taking on new challenges. Foster the asking of questions and staying curious.

Track progress: Set achievable goals and celebrate success. Set small milestones to boost confidence and sustain motivation. "Look at what you have achieved." Avoid comparisons. Assign work to challenge, but not overwhelm.

2. BUILD ON STRENGTHS

Identify positives: "What do they do well?" Recognise these skills with positive affirmations. Focus on these areas and how to apply them on a regular basis. This will start to build their self-belief by highlighting the areas they are naturally good at.

Encourage the sharing of expertise: Helping others is a powerful way to build confidence. Promote the mentoring and supporting of colleagues who are struggling, using other team members to guide and support them.

3. CREATE A RESPECTFUL, SAFE SPACE IN MEETINGS

Welcome all voices: Avoid meetings being dominated by the more vocal members of the team. Actively encourage participation from others, irrespective of their experience. Use positive reinforcement, 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. Let different team members lead and take ownership.

4. ENCOURAGE 'HAVING A GO'

Start small: Give trainees the opportunity to try new and more complex tasks in low-risk situations. Start with simple, non-critical tasks and build on this, reinforcing that it is OK to make mistakes as part of the learning process. True confidence includes humility.

Provide support: Take the pressure off by providing support and guidance along the way. Encourage 'hand-holding' as a safety net, gradually pulling back as the trainee gains experience. Avoid over-correcting where it doesn't matter.

5. PROMOTE ATTENTION TO 'HOW YOU SHOW UP'

Body language: Encourage teams to be mindful of composed body language. "Are they coming across as comfortable, self-assured and ready to participate?" Steady eye-contact, minimal fidgeting, provide open gestures.

Be prepared: Give people the opportunity to prepare in advance to reduce nerves and improve performance. Send out agendas in advance of meetings to manage expectations.

Check out Specialised Learning courses to help develop your students further in these skills

ASSESSING DIGITAL SECURITY AND COMMUNICATION

Use the guides provided here to help assess your students' proficiency level in the skills area of digital security and communication as part of communication generally.

What is it?	Key attributes of the skill
• 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.	• Understands the correct use of sensitive information. • Ensures information remains confidential and secure. • Uses technology safely, professionally and thoughtfully. • Excercises care when accessing work resources on personal devices. • Uses privacy screens and secured WiFi when working off-site.

Use the example questions below to help guide your discussions with students, adapting and expanding on them as needed.

You should expect students to provide clear examples and evidence of feedback before determining the proficiency level.

Proficiency Level	Examples
Accomplished	• Do they consistently model best practice when using digital tools and implement appropriate sharing of sensitive information? • Do they troubleshoot techincal issues and help others to do so in a calm and controlled manner? • Can they give examples where they have anticipated risk to avoid a breach of data security or confidentiality?
Experienced	• Do they use approved digital communication platforms and share files securely, using strong passwords? • Do they know how to report, without delay, any potential security breach? • Do they use software responsibly, only using secure systems and can they report potential security breaches?
Aware	• Can they explain why digital security and communication is important? • Can they use digital communication platforms such as Teams/Zoom/Slack and communicate professionally via email? • Do they use physical security devices when working in public places and can they identify a security breach?

DEVELOPING DIGITAL SECURITY AND COMMUNICATION

Developing digital security and communication in your team, especially in connection with communication, involves setting clear guidelines and using secure tools. Together with 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. DELIVER PRACTICAL TRAINING

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

Access control: Ensure the team know how to set up permission levels for information sources, disclosure levels and other data/systems access.

2. PROVIDE PHYSICAL TOOLS

Supply security items: As appropriate, issue team members with privacy screens, webcam covers, security keys and lockable bags/drawers. Promote the use and familiarity of these.

Allocated areas for privacy: Ensure there are meeting rooms available for confidential discussions, protecting sensitive information. Discourage such conversations in open-plan offices.

3. HAVE DEDICATED 'GO-TO' PEOPLE

GDPR team: Establish a person/team to ensure compliance and to offer guidance. Encourage team members to report potential incidents in a safe, judgement-free setting.

IT experts: Have a central point of contact, whether internal or external, responsible for IT security and protection. Ensure that the team know who to go to with any issues and that new team members are set up safely and securely as part of the onboarding process.

4. SAFE COMMUNICATION SKILLS

Facilitate secure interactions: Promote the use of approved platforms and tools, with only authorised access. Ensure the team know how to use these safely.

Keep data confidential: Support the use of secure links when sending data. Ensure team members protect sensitive attachments with encrypted files or password protection.

5. STAY INFORMED

Set company policies and procedures: Include the reading and understanding of these as part of onboarding and revisit on a regular basis.

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

Check out Specialised Learning courses to help develop your students further in these skills

ASSESSING FEEDBACK

Use the guides provided here to help assess your students' proficiency level in the skills area of feedback as part of communication.

What is it?	Key attributes of the skill
• 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.	• Understands what is going well and where improvement is needed. • Strengthens positive behaviours. • Enhances team dynamics by engaging, motivating and appreciating others. • Fosters personal and professional growth. • Helps to address issues early.

Use the example questions below to help guide your discussions with students, adapting and expanding on them as needed.

You should expect students to provide clear examples and evidence of feedback before determining the proficiency level.

Proficiency Level	Examples
Accomplished	• Do they consistently give timely, specific, objective and actionable feedback to others? • Do they recognise effort in their teams, not just the end results? • Do they reflect on feedback with honesty, make visible adjustments and follow up on progress?
Experienced	• Do they act and follow through on feedback, re-evaluating on a regular basis – reflecting and taking action? • Do they maintain a positive, non-defensive attitude during performance reviews, staying open minded? • Do they seek clarification and ask questions to aid understanding when receiving feedback without interrupting?
Aware	• Can they explain why feedback is important? • Can they give examples showing how constructive feedback has helped them to improve? • Do they proactively ask for, and act on, feedback?

DEVELOPING FEEDBACK

Developing feedback in your team, 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. CREATE AN OPEN FEEDBACK CULTURE

Normalise feedback: Don't wait for annual reviews to let team members know when they have done a good job. Positive, ongoing reinforcement will encourage and motivate. Equally, highlight promptly any areas needing improvement and give opportunity for change. Use feedback loops.

Lead by example: Proactively ask for feedback 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. Explain the impact and clarify understanding. This will build trust. Avoid vague feedback which can cause defensiveness and confusion.

Set clear expectations: Clearly define roles, responsibilities and SMART outcomes from the start. Reference feedback to these and link to development. Provide timelines and data points for progress.

3. LINK TO PROFESSIONAL DEVELOPMENT

Connect to learning goals: Link to the skills a trainee is developing. "How are they doing against objectives?" Turn feedback into future goals. Focus on supporting growth and progress made.

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

Create an environment where feedback flows in all directions: Enable trust and shared learning by facilitating input upward, downward, between colleagues and across teams. This will lead to greater collaboration and understanding.

Use tools to support input from all sides: Implement safe and open communication by using digital and non-digital means of providing multi-way evaluation, 360 reviews. Consider anonymising to encourage unfiltered honesty.

5. TRAINING IN GIVING AND RECEIVING FEEDBACK

Providing feedback: Help team members to build confidence in giving difficult feedback respectfully, with care, and not to shy away from this. Teach them how to be proactive and to deliver positive feedback willingly to promote confidence and growth.

Taking feedback: Encourage trainees to be receptive in receiving feedback and to see negative feedback as an opportunity to learn and to grow, rather than adopting a defensive mindset. "What action will I take?" "What can I learn from this?"
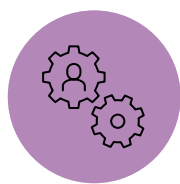
Check out Specialised Learning courses to help develop your students further in these skills

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

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

ASSESSING CURIOSITY

Use the guides provided here to help assess your students' proficiency level in the skills area of curiosity as part of critical thinking.

What is it?	Key attributes of the skill
• 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.	• Identifies the root cause of the problem and opportunities for improvement. • Anticipates issues and builds in contingency. • Sees the plan from different angles and perspectives. • Questions source data for bias, reliability or completeness. • Explores beyond the basics.

Use the example questions below to help guide your discussions with students, adapting and expanding on them as needed.

You should expect students to provide clear examples and evidence of feedback before determining the proficiency level.

Proficiency Level	Examples
Accomplished	• Do they consistently think ahead, show openness to ideas and engage with other colleagues to understand other perspectives? • Do they look for issues and problems before they occur? • Can they provide examples of improvements that have been made as a result of questions they raised?
Experienced	• Can they describe scenarios where they conducted research and explored multiple options? • Can they think of examples where they have initiated open discussion to try to improve a process or output? • Does the student seek feedback on performance?
Aware	• Can they explain why curiosity is important? • Can they describe situations where they have observed a colleague showing curiosity? • Can they describe where they used a mixture of open and closed questioning to increase their understanding of something?

DEVELOPING CURIOSITY

Developing curiosity in your team, 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. ENCOURAGE 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 might we improve this process?"

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

2. CREATE SPACE FOR EXPERIMENTATION

Pilot projects: Allow your team to test new ideas on a small scale. Pilot projects encourage experimentation and reduce the fear of failure.

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

3. MODEL CURIOSITY AND CRITICAL THINKING

Lead by example: Share articles, books, or case studies that have piqued your interest. Let the team see your own curiosity and critical thinking in action.

Challenge your own assumptions: In meetings or discussions, model open-mindedness by openly questioning your own conclusions or previous decisions.

4. CHALLENGE CONVENTIONAL THINKING

"What if?" scenarios: Encourage the team to brainstorm "What if?" scenarios to think through potential changes, disruptions or innovations.

Devil's advocate: Appoint someone to play the role of devil's advocate (someone who pretends to oppose the idea or plan, to make people consider it in more detail) in meetings to challenge ideas and assumptions. This encourages the team to think critically and explore alternative viewpoints.

5. FOSTER OWNERSHIP OF IDEAS

Ownership of problems: Let team members take ownership of solving specific problems. Being responsible for an outcome creates more engagement to find the best solutions.

Innovation challenges: Organise innovation challenges or hackathons where teams can work on creative solutions to real problems. These events naturally promote both curiosity and critical thinking.

Check out Specialised Learning courses to help develop your students further in these skills

ASSESSING ADAPTABILITY

Use the guides provided here to help assess your students' proficiency level in the skills area of adaptability as part of critical thinking.

What is it?	Key attributes of the skill
• 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.	• Thrives in a changing environment. • Anticipates issues and plans appropriately. • Embraces working with new teams. • Adjusts plans to meet new deadlines or changes in project scope. • Supports others and long-term efficiency.

Use the example questions below to help guide your discussions with students, adapting and expanding on them as needed.

You should expect students to provide clear examples and evidence of feedback before determining the proficiency level.

Proficiency Level	Examples
Accomplished	• Do they consistently think ahead, show openness to new ideas and meet deadlines? • Do they look for issues and problems before they occur and adjust plans accordingly? • Can they provide examples of how they have supported others during change?
Experienced	• Can they think of examples where they have successfully worked with new teams? • Do they show a willingness to learn and engage? • Do they respond to multiple requests within appropriate timelines?
Aware	• Can they explain why adaptability is important? • Can they describe situations where adaptability was needed in the workplace? • Do they embrace technology?

DEVELOPING ADAPTABILITY

Developing adaptability in your team, 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: Challenge your team to think of solutions rather than focusing on the problems which leads to frustration.

2. DEVELOP A HABIT OF LEARNING

Ask questions: Encourage a culture of asking if someone is unsure. A questioning mind is an adaptable mind. Encourage skill sharing.

Set aside time for learning: Dedicate time each week 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, plan ahead.

Step out of your comfort zone: Support your team to challenge themselves. Allow them to take on a new task or responsibility.

4. SET SMALL GOALS

Build momentum: By setting small goals teams are more likely to succeed, which boosts confidence and their resilience to change.

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

5. STRENGTHEN EMOTIONAL RESILIENCE

Pause before reacting: Suggest stepping back for a moment and allow the space needed to choose how to respond. Avoid being reactive.

Build support networks: Let your team know that there are people they can rely and lean on if change becomes overwhelming. Encourage stress management techniques – staying calm is a win.

Check out Specialised Learning courses to help develop your students further in these skills

ASSESSING DIGITAL LITERACY

Use the guides provided here to help assess your students' proficiency level in the skills area of digital literacy as part of critical thinking.

What is it?	Key attributes of the skill
• The ability to use digital tools confidently and responsibily. • 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.	• Technically proficient at using devices, systems and software. • Confidently analyses and interprets financial data. • Considers reliability and credibility of digital information. • Effective at working remotely and confident in virtual meetings. • Understands what responsible online behaviour is.

Use the example questions below to help guide your discussions with students, adapting and expanding on them as needed.

You should expect students to provide clear examples and evidence of feedback before determining the proficiency level.

Proficiency Level	Examples
Accomplished	• Do they assist colleagues or others with the use of digital tools? • Can they describe scenarios where they have been able to solve problems using technology? • Do they instinctively use technology to analyse information, present data and solve problems?
Experienced	• Can they give examples showing their ability to adapt to changing technology? • Do they seek opportunities to improve efficiency through the use of digital tools and new technologies? • Can they use technology for daily tasks with minimal support?
Aware	• Can they explain why digital literacy is important? • Can they provide examples of how digital technology was used to complete tasks more efficiently? • Can they give examples of their responsible online behaviour?

DEVELOPING DIGITAL LITERACY

Developing digital literacy in your team, 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. INCORPORATE DIGITAL LITERACY INTO THE ONBOARDING PROCESS

Assess baseline skills: Use reflective self-assessments, proficiency quizzes and practical exercises to identify any training required.

Instil the importance of cyber security and compliance: Discuss recognition of phishing emails, sensitive data, internal controls etc.

2. ENCOURAGE DIGITAL COMMUNICATION AND COLLABORATION

Boost productivity and streamline workflows: Suggest the use of AI-powered assistants for summarising meetings or helping to write notes or reports.

Move towards more collaborative working tools: Get teams working together effectively using eg, shared messaging boards, chat rooms, file sharing.

3. MEET STAKEHOLDER EXPECTATIONS

Handling role responsibilities: Ensure that day-to-day tasks are confidently undertaken using the business's software, tools and systems.

Use data-driven insights: Encourage your team to solve business problems and enhance decision-making using digital solutions.

4. OFFER STRUCTURED AND ON-THE-JOB TRAINING

Set aside time for training: Support attendance on workshops or specific training platforms to facilitate confidence and expertise in digital tools, technologies and platforms.

Promote a question-friendly culture: Create an environment where everyone feels comfortable asking for help, with digital champions available to offer support and guidance.

5. EMBRACE NEW TECHNOLOGY

Encourage an openness to change: Support the use of new technology as an opportunity, not a problem. Create transparency and encourage teams to explore the benefits, supporting organisational goals.

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

Check out Specialised Learning courses to help develop your students further in these skills

ASSESSING ANALYSIS AND EVALUATION

Use the guides provided here to help assess your students' proficiency level in the skills area of analysis and evaluation as part of critical thinking.

What is it?	Key attributes of the skill
• 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.	• Enables a deep understanding of information. • Assesses the significance of data. • Collates meaningful insights from critical interpretation. • Identifies relationships, similarities and differences. • Uses reasoning and structure to examine ideas and processes.

Use the example questions below to help guide your discussions with students, adapting and expanding on them as needed.

You should expect students to provide clear examples and evidence of feedback before determining the proficiency level.

Proficiency Level	Examples
Accomplished	• Can they critically assess the credibility and limitations of data sources? • Do they make recommendations using analytical insight? • Do they look for correlations, segment outputs and use visualisations to present their analysis?
Experienced	• Can they analyse data and explain their evaluation? • Can they spot, and question, anomalies or something that just "doesn't feel quite right"? • Can they explain the source, hence reliability and validity of the data, including data bias and the impact this may have on their evaluation?
Aware	• Can they explain why analysis and evaluation are important? • Can they give examples where they have prepared data for analysis? • Can they give examples where they have identified the need for further information?

DEVELOPING ANALYSIS AND EVALUATION

Developing analysis and evaluation in your team, 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. PROVIDE PRACTICAL HANDS-ON TASKS

Calculate and evaluate: Create opportunities to analyse information and "dig deeper", "beyond the numbers". Demonstrate an understanding of the purpose and context of the analysis.

Present findings: Expect and encourage team members to come with explanations and solutions, not just raw data. Demonstrate an understanding of the numbers. Use visualisation tools.

2. ENCOURAGE A QUESTIONING MIND

"Why?": Encourage your team to question the numbers. "Does this make sense?" "What is the reason for this?"

Normalising the asking of questions. Promote knowing when to ask and create a safe space to do so. "Is there an alternative?"

3. PROVIDE THE TOOLS TO ENABLE EFFECTIVE ANALYSIS

Financial tools: Are teams proficient in the use of relevant software for their day-to-day activities? Is any training needed?

Analytical techniques: Set aside time for training in the use of key metrics, ratios and analysis tools and sources. Do the team 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. ENCOURAGE A DEEPER UNDERSTANDING OF 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. Link opportunities to risk by identifying areas of strength and those needing improvement.

Check out Specialised Learning courses to help develop your students further in these skills

ASSESSING DECISIONS AND RECOMMENDATIONS

Use the guides provided here to help assess your students' proficiency level in the skills area of decisions and recommendations as part of critical thinking.

What is it?	Key attributes of the skill
• 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.	• Presents alternatives as a basis for choice. • Provides clear justification for proposed solutions. • Takes responsibility for proposals. • Highlights and identifies challenges and risks. • Able to work independently but knows when to ask for help.

Use the example questions below to help guide your discussions with students, adapting and expanding on them as needed.

You should expect students to provide clear examples and evidence of feedback before determining the proficiency level.

Proficiency Level	Examples
Accomplished	• Do they consider the impact of decisions and recommendations on others? • Do they reflect on past decisions to learn and improve? • Do they demonstrate strategic awareness in their recommendations?
Experienced	• Do they consistently apply professional judgement in making timely ethical decisions? • Do they support recommendations with objective analysis of data, trends, benchmarks and forecasts, considering risks of options? • Can they give examples showing where their recommendations have made an impact?
Aware	• Can they explain why being able to make decisions and provide recommendations is important? • Can they explain their approach to decision-making? • Do they understand when it is appropriate to make a decision and when to seek advice?

DEVELOPING DECISIONS AND RECOMMENDATIONS

Developing decisions and recommendations in your team, 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: Ensure your team understands the problem, confirm this by talking and consulting with those involved. "Why does it matter?" Establishing a clear grasp of the requirement leads to better decisions.

2. DEVELOP RISK AWARENESS

Balance confidence with caution: Encourage teams to recognise when to go ahead and when to seek input/consult with senior colleagues. "Is this a low-risk decision?"

Assess risk: Promote asking "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 the reasonings backed up by sufficient evidence?" Encourage a culture of learning from mistakes.

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

4. DEVELOP CONFIDENCE IN RECOMMENDING SOLUTIONS

Evidence based: Explain the importance of linking recommendations to facts and data, new or historic.

Alternatives: Present options with supporting evidence to your team. Provide the pros and cons of different options. Encourage anticipating and addressing questions, concerns and objections.

5. FOSTER A CULTURE OF ACCOUNTABILITY AND OWNERSHIP

Empowerment: Encourage your team to make decisions appropriate to their role. Create a safe space, allowing them to 'try' and ask questions; building trust. Avoid micromanagement but build boundaries and expectations.

Set clear expectations: "What are they responsible for?" "How does this fit into the bigger picture?" How does it impact wider teams?

Check out Specialised Learning courses to help develop your students further in these skills

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

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

ASSESSING SELF AWARENESS

Use the guides provided here to help assess your students' proficiency level in the skills area of self awareness as part of emotional intelligence.

What is it?	Key attributes of the skill
• 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.	• Facilitates emotional self-regulation. • Improves communication skills. • Enables more effective teamwork and leadership. • Supports good decision-making. • Helps promote personal growth and development.

Use the example questions below to help guide your discussions with students, adapting and expanding on them as needed.

You should expect students to provide clear examples and evidence of feedback before determining the proficiency level.

Proficiency Level	Examples
Accomplished	• Do they consistently demonstrate high awareness of emotions, tensions and pressures, managing themselves and others through challenging situations? • Do they demonstrate behaviours aligned with their values, even when challenged? • Can they handle conflict calmly, constructively and without blame, considering how others may feel?
Experienced	• Do they demonstrate a respect for professional boundaries, recognising their emotional trigger points? • Do they adapt their approach when necessary, recognising the impact of differing body language and personalities? • Do they acknowledge and appreciate their own development needs, understanding their limitations?
Aware	• Can they explain why self-awareness is important? • Can they provide examples of where they have needed to manage their emotions and reactions? • Do they respond positively to feedback without being defensive?

DEVELOPING SELF AWARENESS

Developing self awareness in your team, 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: Encourage your team to look at unbiased, undistorted analysis of their strengths, weaknesses, emotions and habits. Ask them to consider how these behaviours affect others.

Understand your abilities: Are team members mindful of their strengths and limitations? Do they know when to ask for support and where development may be needed? Acknowledging these will help them to make better decisions, build humility, improve collaboration and increase awareness.

2. ENCOURAGE 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: Promote clarification of 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 they feel defensive, impatient, dismissive or anxious? Recognising triggers is a sign of maturity and increased self-awareness.

Consider responses: Are they being reactive, or giving calm, constructive responses? Are they able to manage their behaviour "in the moment"?

4. WHAT IMPRESSION DO YOU CREATE?

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

Alignment with core values: Are they behaving authentically, aligned to their own values and consistently acting 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 willingness to learn. This will promote a positive, supportive team culture, building trust and strengthening collaboration.

Check out Specialised Learning courses to help develop your students further in these skills

ASSESSING VALUES

Use the guides provided here to help assess your students' proficiency level in the skills area of values as part of emotional intelligence.

What is it?	Key attributes of the skill
• 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.	• Guides ethical behaviour. • Fosters a positive work culture. • Enhances decision-making. • Builds respect and trust with stakeholders. • Promotes team motivation and engagement.

Use the example questions below to help guide your discussions with students, adapting and expanding on them as needed.

You should expect students to provide clear examples and evidence of feedback before determining the proficiency level.

Proficiency Level	Examples
Accomplished	• Do they consistently model business and personal values through their own actions? • Do they ensure that their teams/colleagues feel valued through showing appreciation, respect and trust? • Do they consider values as part of their decision-making and reference those values in explanations?
Experienced	• Do they show professional values in taking responsibility for the accuracy and integrity of their work? • Do they demonstrate value-driven behaviour in their interactions with colleagues and stakeholders, aligning what they say and do? • Can they describe scenarios to show where they have respected the values of others and been open to different viewpoints?
Aware	• Can they explain why values are important? • Can they describe situations where their values influenced or changed their behaviour in the workplace? • Do they understand the business's core values and how their own personal values align with these?

DEVELOPING VALUES

Developing values in your team, 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. DEFINE THE CORE VALUES OF THE BUSINESS

Create awareness: Make the values easy to understand and transparent, so that everyone knows what they are and what is expected.

Reflect the desired culture: Do the values reflect the behaviours and workplace environment you want to create?

2. LINK TO ETHICS

Becoming trusted professionals: Encourage teams to consider personal and organisational values when making ethical decisions and show how their roles support trust, transparency and fairness.

Embed values into the strategy of the business: This will promote trusted relationships, business resilience and sustainable growth.

3. "ACTIONS SPEAK LOUDER THAN WORDS"

Model your values: Let your team see you putting your personal values/the business's values into action through behaviours in meetings, conversations and connections with stakeholders. Encourage and recognise when your team 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. Are everyone's strengths recognised and valued?

Create a sense of belonging: Do people know that they matter? Do they feel part of the "bigger picture"?

5. RESPECTING THE VALUES OF OTHERS

Acknowledge differences respectfully: Promote separation of the person from the opinion. Model and encourage humility and the recognition of alternative perspectives. Create a safe space for dialogue, managing conflicting values.

Education: Expand the team's cultural and ethical diversity awareness. Explore how values differ between cultures, religions and communities.

Check out Specialised Learning courses to help develop your students further in these skills

ASSESSING RESILIENCE

Use the guides provided here to help assess your students' proficiency level in the skills area of resilience as part of emotional intelligence.

What is it?	Key attributes of the skill
• 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.	• Shows stamina and focus when workloads are high. • Recovers well when mistakes happen. • Adaptable in a changing environment. • Stays motivated during setbacks. • Flexible and calm when things don't go to plan.

Use the example questions below to help guide your discussions with students, adapting and expanding on them as needed.

You should expect students to provide clear examples and evidence of feedback before determining the proficiency level.

Proficiency Level	Examples
Accomplished	• Do they consistently show strength and leadership in times of high-pressure challenges? • Do they empower and help others to build resilience? • Can they give examples of how they have been able to thrive in challenging situations, using setbacks as an opportunity for growth?
Experienced	• Can they highlight examples of how they have adapted and responded positively to last-minute changes? • Can they describe situations where they have successfully managed emotions, pressure and workload – staying focused with conflicting demands? • Do they recognise trigger points and adopt coping strategies to manage these and bounce back?
Aware	• Can they explain why resilience is important? • Can they effectively balance work, their personal life and study, are they organised, meeting deadlines, turning up on time? • Do they take time to reflect and act on feedback, with a desire to learn from it?

DEVELOPING RESILIENCE

Developing resilience in your team, 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: Encourage the team to identify and focus on the most important and impactful tasks first. This will help to reduce time-pressured stresses.

Scheduling and planning: Provide time-management tools to structure work efficiently. This helps the team to stay organised, meet deadlines and maintain a healthy work-life balance.

2. KNOWLEDGE BUILDING

Build on existing knowledge: Strengthen an individual's ability to face challenges, recover from setbacks and thrive in high pressure situations by continuing to learn and expand their expertise.

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. LEAD BY EXAMPLE

Demonstrate resilience: Let the team see you remaining calm, adaptable and solution-focused under pressure, with clear communication.

Model coping strategies: Encourage the team to take breaks and set boundaries, especially during high pressure periods. 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.

Reduce fear of failure: Reframe failure as an opportunity to learn. Encourage self-compassion, treating yourself with kindness, which promotes recovery and emotional stability. Allow time to reflect.

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: Encourage a "no-blame" culture, where challenges are faced together. A person demonstrating resilience leads to a stronger, more adaptable team.

Check out Specialised Learning courses to help develop your students further in these skills

ASSESSING EMPATHY

Use the guides provided here to help assess your students' proficiency level in the skills area of empathy as part of emotional intelligence.

What is it?	Key attributes of the skill
• 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.	• Facilitates the building of stronger relationships and trust. • Improves inclusive leadership. • Helps to reduce conflict. • Promotes active listening and the importance of understanding body language. • Recognises the challenges others face.

Use the example questions below to help guide your discussions with students, adapting and expanding on them as needed.

You should expect students to provide clear examples and evidence of feedback before determining the proficiency level.

Proficiency Level	Examples
Accomplished	• Do they provide mindful and considerate feedback for their team? • Do colleagues find it easy to go to them with their concerns – an open door without judgement? • Do they consistently consider the human impact of financial decisions, not just numbers and compliance?
Experienced	• Can they give examples of scenarios where they have adjusted their communication style to recognise emotional needs? • Do they check in on colleagues following challenging interactions? • Do they actively support others during periods of change or uncertainty?
Aware	• Can they explain why empathy is important? • Do they understand the need for a balance between caring for others, while respecting emotional boundaries? • Do they recognise when colleagues may need help and offer support?

DEVELOPING EMPATHY

Developing empathy in your team, 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. NURTURE THOUGHTFUL AND GENUINE INTERACTIONS

Active listening: Expect that people are present in the conversation, not distracted by phones and other things going on. Encourage teams to reflect back on what was said: "It sounds like you are feeling …"

Respond with care and understanding: Advocate providing comfort and reassurance, rather than the focus being to try to "fix" the problem. Promote the asking of open-ended questions.

2. PROMOTE OPEN DIALOGUE

Regular check-ins: Provide opportunities for team members to share challenges, concerns and experiences in a safe space. This is even more important in remote working situations.

Lead by example: Model open and respectful communication. Encourage others to do the same. This will foster meaningful connections, avoiding conflict.

3. PERSONAL DEVELOPMENT

Create time for learning: Provide a space for open discussion or hands-on workshops – covering scenarios "walking in someone else's shoes". A great way to learn and develop an appreciation of diversity and differing perspectives.

Emotional intelligence training: Encourage empathy workshops/structured training to strengthen both an individual and team ability to enhance emotional connection, understanding and interpersonal skills.

4. THINK BEYOND YOURSELF

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

Building stronger teams: Encourage a supportive team culture, recognising and responding to each other's needs. This approach will promote trust and loyalty, flowing in all directions.

5. FOSTER UNDERSTANDING OF OTHERS

Shadowing: Promote spending time with other teams/watching people in other roles. "What challenges do they face?" Does the better appreciation change their mindset to enable greater connection and understanding?

"Remember when?" Encourage more senior team members to reflect on their own experiences in a more junior role. Remember the challenges and frustrations faced. This also works the other way round, to enable junior colleagues to better appreciate the pressure faced by more experienced colleagues.

Check out Specialised Learning courses to help develop your students further in these skills

ASSESSING APPRECIATING OTHER VIEWPOINTS

Use the guides provided here to help assess your students' proficiency level in the skills area of appreciating other viewpoints as part of emotional intelligence.

What is it?	Key attributes of the skill
• 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.	• Encourages trust and mutual respect. • Reduces conflict by better understanding. • Helps 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.

Use the example questions below to help guide your discussions with students, adapting and expanding on them as needed.

You should expect students to provide clear examples and evidence of feedback before determining the proficiency level.

Proficiency Level	Examples
Accomplished	• Do they encourage and facilitate differing opinions in group discussions and meetings and adapt accordingly? • Do they integrate diverse viewpoints, based on team insight, into their decision-making? • Can they provide examples to show how they have built trust and collaboration across diverse teams?
Experienced	• Can they give examples to show that being able to see things from an alternative point of view has resulted in a better business outcome? • Can they demonstrate their ability to adapt communication and working styles to accommodate diverse perspectives? • Do they welcome and give feedback with respect and openness?
Aware	• Can they explain why it is important to appreciate other viewpoints? • Do they demonstrate an awareness of unconscious bias, diversity and inclusion? • Do they listen attentively, without interruption, even when they disagree?

DEVELOPING APPRECIATING OTHER VIEWPOINTS

Developing appreciating other viewpoints in your team, 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: Foster an appreciation that individuals with different backgrounds, cultures, identities and experiences will introduce alternative ways of thinking. This will bring greater breadth to discussions.

Be culturally and diversity aware: Are your teams mindful of holidays, religious practices, traditions or other diversities that may be different from your own? Encourage inclusion and sharing of these in the workplace. Question your own, and your team's biases and continue to learn.

2. COLLABORATION ACROSS FUNCTIONS

Connect with other departments/teams: Support the understanding of how decisions can impact other areas of the business. "Why may they have different priorities, challenges and therefore perspectives?" This will build stronger relationships and a wider understanding of business operations and stakeholder needs.

Foster a holistic approach: Promote well-rounded, integrated decision-making by considering multiple business-wide perspectives. Ask teams to move beyond the numbers to consider how decisions affect people, operations and long-term goals.

3. FOSTER A CULTURE OF RESPECT

Show humility: Even when team members disagree, encourage them to validate part of what someone else is saying and build on this. Each point of view has merit. Objectively look at the reasons for their opinion. Using this approach can help to build trust and defuse tension. Stay open to "changing your mind".

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

4. BE OPEN TO DIFFERENT WORKING STYLES

Appreciate varying approaches: Encourage understanding and flexibility in work styles. 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: Let team members work together in a collaborative way so that they see the improved value from incorporating different problem-solving techniques and thinking.

5. ALLOW SPACE FOR BOTH NEW AND EXPERIENCED PERSPECTIVES

Junior team members: They may bring fresh thinking and question the status quo of outdated processes – be open to new ideas. Encourage senior team members to be receptive and engage with ideas.

Senior team members: They may bring experience and historical knowledge; focusing on strategy and the "bigger picture". Encourage junior team members to learn and respect this insight.

Check out Specialised Learning courses to help develop your students further 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
Working together, positively sharing expertise to achieve a common goal. Combining different perspectives and skills to create a better outcome. Actively encouraging open and inclusive communication. Inspiring trust and motivation to encourage a more cohesive work environment.	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. Making sure that the right work gets done at the right time, by the right people – it anticipates risks and resolves conflicts.	Using digital technology to solve problems and improve performance. Looking at new and emerging technologies for better solutions to improve efficiency and implementation. Combining technical confidence with creativity and curiosity for continuous improvement.	Actively appraising your own self-development and personal growth. Being self-aware by consciously pursuing continual learning to improve your skills, knowledge, behaviours and mindset. Taking ownership of your own learning and development.	Actively supporting the growth, learning and success of your team. Identifying and supporting development opportunities for others. Providing effective coaching, mentoring, encouragement and feedback. Building confidence and improving skillsets in others.

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

ASSESSING COLLABORATION

Use the guides provided here to help assess your students' proficiency level in the skills area of collaboration as part of leadership.

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

- Embraces 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 efficiency and reduces duplication.
- Promotes innovation and creativity.

Use the example questions below to help guide your discussions with students, adapting and expanding on them as needed.

You should expect students to provide clear examples and evidence of feedback before determining the proficiency level.

Proficiency Level	Examples
Accomplished	• Do they consistently include others and value different perspectives when making decisions? • Do others regularly seek their input because they actively listen and contribute respectfully? • Do they look to work across teams/department to drive better outcomes?
Experienced	• Do they willingly work as part of a team, embracing and celebrating success for the group, not just themselves – prioritising team goals? • Do they demonstrate an openness to new ideas and different ways of doing things? • Can they describe situations where they have needed to compromise, with an understanding for the bigger picture?
Aware	• Can they explain why collaboration is important? • Can they give examples where they have worked as part of a wider team? • Do they offer help to support colleagues during busy periods?

DEVELOPING COLLABORATION

Developing collaboration in your team, 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. BUILD TEAM PLAYERS

Model team priorities over personal goals: Share credit and acknowledge collective efforts. Use inclusive language – "we" and "us". Avoid one person dominating the task. Encourage team members to help others.

Create opportunities for collaboration: Assign team projects and work that needs input from others. Set metrics and goals that are shared and rely on contribution from multiple sources.

2. FACILITATE ONGOING COMMUNICATION

Encourage regular check-ins: Dedicate time for updates, to check progress and address any challenges. Also use this time to acknowledge and appreciate small wins.

Facilitate discussion, debate and negotiation: Foster active listening and respectful, honest dialogue. Ensure all team members feel heard and understood. This builds trust and keeps everyone on the same page.

3. CREATE ACCOUNTABILITY

Set clear roles and responsibilities: "Who is doing what?" This helps to prevent conflict and confusion. Encourage flexibility and adjustment of roles to help others as needed.

Establish time frames and expectations: Ensure the wider team is aligned by understanding the end goal and how their contribution fits into this – ownership for their input. Be clear on any deadlines.

4. LEVERAGE TEAM MEMBERS' STRENGTHS

Match skills to roles: Establish what team members are naturally good at and have a passion for. This encourages commitment, allows each person to contribute their best work, building confidence and resulting in the optimal end product.

Balance the team: Create diverse teams with different backgrounds and skills, where open minds consider alternative viewpoints, leading to better solutions. Manage conflict with understanding and positivity.

5. PROMOTE ACTIVE ENGAGEMENT

Encourage participation: Promote a willingness to volunteer, to speak up and to take forward actions. Avoid blame, learn from mistakes. Ensure that everyone is playing their part.

Support wider interaction and dialogue: Embrace open cross-team communication, to build relationships, enhance knowledge sharing and reinforce the value in breaking down silos. Consider the use of shared collaboration tools. Look to the wider vision.

Check out Specialised Learning courses to help develop your students further in these skills

ASSESSING PROJECT MANAGEMENT

Use the guides provided here to help assess your students' proficiency level in the skills area of project management as part of leadership.

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 they impact progress.
• Monitoring and tracking progress.

Key attributes of the skill
• Allocates time, people and budget effectively.
• Tasks are kept on track by monitoring progress and amending as needed.
• Efficiently delivers reliable outputs.
• Manages multiple tasks and deadlines.
• Collaborates with all parties and stakeholders.

Use the example questions below to help guide your discussions with students, adapting and expanding on them as needed.

You should expect students to provide clear examples and evidence of feedback before determining the proficiency level.

Proficiency Level	Examples
Accomplished	• Do they consistently manage multiple workflows, taking full ownership at each stage?
	• Do they have examples where they have anticipated problems and spoken up to manage risk and keep assignments on track?
	• Can they confidently and successfully oversee, guide and coordinate teams to keep tasks on track and deliver successful outcomes?
Experienced	• Do they clarify understanding of expectations and clearly relay that to other team members?
	• Do they demonstrate an appreciation and respect for budgets when undertaking tasks?
	• Do they maintain quality of output, delivered on time, even under pressure?
Aware	• Can they explain why project management is important?
	• Do they maintain organised records?
	• Do they manage their time and prioritise tasks effectively?

DEVELOPING PROJECT MANAGEMENT

Developing project management in your team, 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: Encourage up-front attention to what is important and allocation of resource to meet this. Allow buffers in case of unexpected delays – contingencies. Let your team know 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 and give others responsibility for sections of the project. This also allows more junior team members to "have a go" in low-risk areas.

Match tasks to the right person: Support the project manager in identifying skills, strengths, experience and availability. Getting the right people for the job, with diverse perspectives, will lead to improved engagement and a better end result.

3. DEVELOP COMMUNICATION SKILLS

Look at interactions: Encourage focused discussion with clear objectives. Practise active listening.

Interpersonal relationships: "Are they team players?" "Do they treat colleagues with respect and understanding?" By working collaboratively and encouraging others to do so, team members will stay on task and this will lead to greater overall success.

4. CLARITY AND EXPECTATIONS

What is the project scope? Encourage clearly defined expectations and deliverables and ensure everyone involved is on board with these. "What are the risks?"

Have ongoing updates: Facilitate initial kick-off meetings to set out team responsibilities and timelines. Following up with regular updates and milestone tracking throughout the project will keep things on track. Keep a central project hub.

5. PERSONAL DEVELOPMENT

Use of mentors: Promote pairing with more experienced team members to provide insight and guidance on planning and task management. This will help them to grow and contribute to project success.

Upgrading knowledge: Ensure team members stay aligned and up to date with tools and industry advances. This will enhance their ability to plan, lead and deliver projects with better results.

Check out Specialised Learning courses to help develop your students further in these skills

ASSESSING DIGITAL CAPABILITY AND INNOVATION

Use the guides provided here to help assess your students' proficiency level in the skills area of digital capability and innovation as part of leadership.

What is it?	Key attributes of the skill
• 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.	• 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.

Use the example questions below to help guide your discussions with students, adapting and expanding on them as needed.

You should expect students to provide clear examples and evidence of feedback before determining the proficiency level.

Proficiency Level	Examples
Accomplished	• Do they consistently show understanding of digital tools and consider their strengths and weaknesses in carrying out tasks? • Can they articulate and help others in their use of digital resources – assisting with change and adapting? • Can they give examples where they have suggested new or different technologies to benefit efficiencies or achieve goals in a better way?
Experienced	• Do they openly try new technology to understand capabilities and limitations? • Do they look for better solutions to improve processes and quickly adapt to change? • Do they ask appropriately pitched questions to access support quickly when needed?
Aware	• Can they explain why digital capability and innovation is important? • Do they use workplace digital tools effectively? • Do they give new tools/systems a go but ask for help at the right point?

DEVELOPING DIGITAL CAPABILITY AND INNOVATION

Developing digital capability and innovation in your team, 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. ENCOURAGE THE USE OF TECHNOLOGY IN DAY-TO-DAY TASKS

Use of digital tools: Promote the use of technology as the default for communication and the analysis/presentation of data. Make tools easily accessible and learn by "doing".

Lead by example: Consistently use and demonstrate digital tools. Incorporate shared documents and live dashboards into meetings. Collaborate using shared files.

2. CHALLENGING PROCESSES

Foster a culture of questioning: Encourage team members to use critical thinking at all levels, to speak up and ask why something is done the way it is. Try new ideas, promote innovation, be early adopters.

Propose better solutions: Do they have any other ideas? Are there smarter, more efficient ways of working to improve processes and outcomes?

3. SHARING SOLUTIONS

Set up a forum or suggestion box: Encourage team members to use these to share common pain points. It is likely that others may have already faced the issue and have a solution to share.

Promote knowledge sharing: If someone has a neat solution to a given problem, set up a process to enable them to share it wider across the business, so others may benefit from it. Consider "Tech Tips" channels or boards.

4. SET UP DIGITAL CHAMPIONS

Shadowing: Identify team members who use digital tools effectively and allow time for others to learn from them. This may be junior employees who are often better equipped in using modern tools. This will also help to boost confidence and self-assurance by recognising something they are good at.

Set clear expectations for the digital champions: What are they responsible for? Supporting colleagues? Encouraging process improvement and new ways of working? Sharing knowledge? Sharing platforms?

5. PROVIDE ONGOING TRAINING

Embed digital training into the business culture: Make this an integral part of everyone's role. Include digital goals and upskilling in performance reviews and development plans.

Dedicate time for learning: Create space to ensure the team stays ahead by encouraging continuous learning relevant to their roles – workshops, online courses, short videos and learning from each other.

Check out Specialised Learning courses to help develop your students further in these skills

ASSESSING DEVELOPING SELF

Use the guides provided here to help assess your students' proficiency level in the skills area of developing self as part of leadership.

What is it?	Key attributes of the skill
• 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.	• Focuses on 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.

Use the example questions below to help guide your discussions with students, adapting and expanding on them as needed.

You should expect students to provide clear examples and evidence of feedback before determining the proficiency level.

Proficiency Level	Examples
Accomplished	• Do they consistently take on tasks outside their comfort zone to progress their own development? • Do they actively stay up to date, seeking opportunities to improve and proactively ask for feedback on their performance? • Do they have a clear plan for their own career path, including the steps and development needed to get there?
Experienced	• Can they think of situations where they have been able to do a better job through learning new skills? • Do they have a questioning mindset to improve knowledge and understanding? • Do they ask for feedback, and both acknowledge and act on areas for improvement?
Aware	• Can they explain why "developing self" is important? • Do they volunteer and take on new experiences and challenges? • Do they ask for help to complete a task or wait to be asked?

DEVELOPING DEVELOPING SELF

Developing self in your team, 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. ENCOURAGE CONTINUOUS LEARNING

Create a learning-friendly environment: Empower the team to improve skills by providing a safe space for open discussions and questions, where knowledge is shared, mistakes seen as opportunities to learn, and workplace learning is "the norm".

Provide access to resources: Allow time for hands-on training, online courses, videos, books and time with subject matter experts to foster greater expertise. Create regular learning events such as "Lunch and Learn" workshops.

2. PUT ROADMAPS IN PLACE

Use personal development plans: Work with team members to identify strengths and areas for improvement. Facilitate any key areas. Track progress, support feedback and adapt where necessary.

Set career goals: "What are their aspirations?" "Are they on track to get there?" "What additional skills do they need to develop?" "What are the timelines?"

3. LEAD BY EXAMPLE

Sharing: Openly engage in your own growth journey. Talk about your own goals and what you are working on. Encourage others to do the same, supporting one another, sharing stories and feedback.

Participate: Join learning events, trainings and courses, as appropriate, with the team. This gives a clear signal that continuing to learn, at all levels, is a priority. Support and encourage participation in training.

4. SUPPORT SKILL-BUILDING

Growth opportunities: Give team members "stretch tasks" to push them beyond their current level, offering support alongside from senior colleagues. This will help to expand their expertise and gain confidence.

Encourage on-the-job learning: Facilitate shadowing to observe others. Allow rotations across teams and departments to broaden skillsets and knowledge base. Promote teachings from more experienced team members. Consider using digital badging to recognise learning.

5. DON'T FORGET THE 'SOFTER' SKILLS

Promote improved behaviours: Reference back to other competencies and skills. Look at strategies to develop softer skills such as emotional intelligence, self-awareness, resilience and confidence. Support learning opportunities in these areas in addition to technical skills and knowledge.

Support a growth mindset: Foster the belief that challenges are opportunities to improve and move forward. Encourage team members to develop a positive outlook, with belief in their potential.

Check out Specialised Learning courses to help develop your students further in these skills

ASSESSING DEVELOPING OTHERS

Use the guides provided here to help assess your students' proficiency level in the skills area of developing others as part of leadership.

What is it?	Key attributes of the skill
• 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.	• 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 gowth.

Use the example questions below to help guide your discussions with students, adapting and expanding on them as needed.

You should expect students to provide clear examples and evidence of feedback before determining the proficiency level.

Proficiency Level	Examples
Accomplished	• Do they actively create opportunities to build confidence and growth in others while successfully delivering outcomes? • Do they provide support and guidance to others, even when under pressure? • Can they give examples of how they have mentored and coached others to progress and improve?
Experienced	• Do they provide constructive, actionable feedback when reviewing the work of other team members? • Do they openly share knowledge and collaborate to help others succeed? • Do they delegate tasks with learning in mind?
Aware	• Can they explain why developing others is important? • Can they describe scenarios where they have helped colleagues to understand day-to-day tasks and key processes? • Do they take the time to share their learning with their peers?

DEVELOPING DEVELOPING OTHERS

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

1. HIGHLIGHT OPPORTUNITIES TO IMPROVE

Pay attention: Encourage the team to listen and identify someone's interests and strengths. This insight can be used to align tasks and learning opportunities. It engages and motivates individuals, making them feel valued and more confident.

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

Use shadowing: Facilitate learning from one another. Ask more senior people in the team to allow others to observe them, and to explain how and why they did things in the way they did.

Offer training sessions: Provide opportunities for presenting updates and briefings, covering a range of topic areas. Allow them to pass on practical insight and encourage continuous learning.

3. PROMOTE ONGOING DIALOGUE

Frequent catch-ups: Encourage team members to check-in frequently with their 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.

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

4. COACHING AND MENTORING

Promote coaching within the team: Support the team in asking questions, actively listening and guiding others to find their own solutions, rather than offering answers. Ask: "What are the options?" "Why do you think that?" This will build confidence and the give the opportunity for others to think for themselves.

Set up mentors or buddy systems: Let more experienced team members mentor colleagues. This is more about them supporting by offering guidance, sharing experiences and helping their mentees to grow, personally and professionally.

5. MAKE DEVELOPING OTHERS A PRIORITY

Foster a people-focused culture: Promote a culture where people are the most valuable asset, where an individual's well-being, development and contribution are the foundation of team success. This encourages development as a shared responsibility, giving credit to others for their contributions.

Build in time to support others: Ensure that time is built into workplans and projects to allow for guiding someone else. Create space and "permission" to allow this to happen.
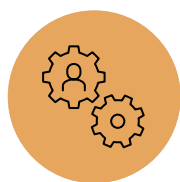
Check out Specialised Learning courses to help develop your students further in these skills

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

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

ASSESSING ACCOUNTABILITY

Use the guides provided here to help assess your students' proficiency level in the skills area of accountability as part of professionalism.

What is it?	Key attributes of the skill
• 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.	• Focuses on completing tasks and goals to deadlines and standards. • Takes ownership of decisions whatever the outcome. • Is open and honest about progress, challenges and mistakes. • Demonstrates willingness to accept feedback and recognise consequences. • Acts ethically and within the rules.

Use the example questions below to help guide your discussions with students, adapting and expanding on them as needed.

You should expect students to provide clear examples and evidence of feedback before determining the proficiency level.

Proficiency Level	Examples
Accomplished	• Do they commit to team decisions and reflect on both achievements and mistakes? • Do they proactively address challenges, to help prevent bigger issues, while maintaining high standards of accuracy and professionalism? • Can they give examples of owning a situation and working towards a solution when things are not going to plan?
Experienced	• Do they explain their actions and accept feedback, learning from mistakes ? • Do they manage expectations and keep stakeholders updated on timelines and progress? • Do they clearly define roles and responsibilities in teamwork?
Aware	• Can they explain why accountability is important? • Do they complete assigned tasks accurately and on time without being reminded? • Do they avoid excuses and admit mistakes?

DEVELOPING ACCOUNTABILITY

Developing accountability in your team, 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. SET CLEAR EXPECTATIONS

Define roles, responsibilities and expectations: Clearly set out "Who does what?" What does success look like? How will they be measured? Use documentation. Clarify understanding and expectations.

Foster 'buy-in': Involve the team in the early stages of planning. People are more likely to be held accountable for something they have accepted and are willing to engage and contribute to.

2. ENCOURAGE OWNERSHIP

Encourage autonomy: Encourage and allow individuals to make decisions, appropriate to their role. Someone who feels trusted is more likely to take ownership.

Avoid micro-managing: Clearly define expected outcomes and provide support without controlling every step. Provide space, showing trust and encourage independent thinking.

3. PROVIDE TIMELINES AND SPECIFIC DEADLINES

Be realistic: Set deadlines that promote accountability and are realistic and achievable. This will encourage teams to strive towards the goals without compromising accuracy or performance.

Use smaller milestones: Break down tasks 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: Encourage a culture where everyone feels able to own up to mistakes without fear of blame. This encourages 'stepping forward' and not hiding behind excuses.

Learn from mistakes: Use feedback to build skills. Support active learning from mistakes and look for ways to improve. Focus on solutions.

5. STRENGTHEN TEAM ACCOUNTABILITY

Hold each other accountable: Nurture a culture where team members can openly discuss responsibilities, ask for help and raise concerns/ reminders. Encourage respectful peer accountability.

Track progress: Facilitate transparency using collaborative platforms and management tools eg, dashboards, task boards, checklists to make responsibilities and deadlines visible to all. Use regular check-ins – consider daily scrum meetings.

Check out Specialised Learning courses to help develop your students further in these skills

ASSESSING RELIABILITY

Use the guides provided here to help assess your students' proficiency level in the skills area of reliability as part of professionalism.

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
• Effectively manages resources and time to meet deadlines.
• Consistently meets expectations.
• Focuses on accuracy and attention to detail.
• Fulfils team and individual responsibilities.
• Builds a reputation of trustworthiness.

Use the example questions below to help guide your discussions with students, adapting and expanding on them as needed.

You should expect students to provide clear examples and evidence of feedback before determining the proficiency level.

Proficiency Level	Examples
Accomplished	• Do they stay dependable and aligned to priorities, even when workloads and pressures are high? • Do they onboard and train new team members, based on proven trust from organisation leaders? • Can they manage complex or high-priority assignments?
Experienced	• Can they show examples of being able to balance multiple priorities and maintain a consistent standard of work? • Can they be counted on to deliver their part of teamwork/projects? • Do they have examples of communicating proactively to highlight problems and risks to timelines, suggesting possible solutions?
Aware	• Can they explain why reliability is important? • Do they take pride in delivering high-quality work on time? • Do they arrive on time and come prepared?

DEVELOPING RELIABILITY

Developing reliability in your team, 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: Ensure that everyone knows what the priorities are. Set realistic deadlines. This enables teams to manage their time effectively, improve quality and consistently meet expectations. Smart planning is key to reliability. Support discipline with time management and learning 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.

2. CREATE OPPORTUNITIES

Give ownership: Let team members step up and "have a go". Create low-risk opportunities for them to demonstrate reliability by providing them with new responsibilities. Allow them to take initiative.

Recognise and reinforce: Acknowledge people who reliably and consistently meet deadlines, honour commitments and uphold high standards. Encourage learning and improving when things go wrong.

3. BUILD IN QUALITY ASSURANCE

Check your work: Create an expectation that accuracy and completeness are key. This minimises the need for corrections and changes later.

Establish consistent standards: Clearly communicate expectations to ensure everyone understands what is required. Well-defined guidelines make it easier to measure performance objectively and promote consistent, reliable outcomes across the team.

4. COMMUNICATE CLEARLY

Communicate early if something changes. Encourage the team to let others know if anything happens which may affect their ability to meet their commitments. It is important to be proactive.

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: Encourage team members to show up on time, submit work on time and respond to messages in a timely manner. This behaviour will build trust from colleagues and other stakeholders.

Do what you say you are going to do: Promote a culture of always following through, without over-committing; where it is OK to say, up front, if you can't do it. It is much better to admit that you are unable to deliver from the start than to cause issues further down the line. People respect honesty and integrity.

Check out Specialised Learning courses to help develop your students further in these skills

ASSESSING SELF REVIEW

Use the guides provided here to help assess your students' proficiency level in the skills area of self review as part of professionalism.

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
• Encourages reflection on work quality and output.
• Helps to promote a mindset of ongoing learning.
• Fosters personal accountability and ownership.
• Helps managers to understand your perspective and ambitions in performance appraisals.
• Supports alignment with organisational objectives.

Use the example questions below to help guide your discussions with students, adapting and expanding on them as needed.

You should expect students to provide clear examples and evidence of feedback before determining the proficiency level.

Proficiency Level	Examples
Accomplished	• Do they reflect on how their actions affect others when leading or guiding teams? • Can they give examples of where they have mentored and supported others in their development? • Do they consider the impact of their work on the wider business objectives?
Experienced	• Do they look at themselves critically, giving examples of situations where their performance was good or they could have done better? • Do they encourage upward feedback from team members and can they demonstrate where they have acted on this? • Do they have a plan for their own career path, showing a commitment to personal growth?
Aware	• Can they explain why self review is important? • Can they give examples showing how they have learnt and grown from mistakes? • Do they identify knowledge gaps and seek appropriate training?

DEVELOPING SELF REVIEW

Developing self review in your team, 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. PROVIDE TIME FOR REFLECTION

Dedicated time: Encourage trainees to take time for reflection and self-analysis. Consider the use of quiet spaces. Schedule and allow time for this.

Documentation of thoughts: Offer tools or optional templates for journalling. Use physical journals or notebooks; or digital notes and apps. This helps to clarify thinking, highlight patterns and track growth.

2. CONSIDER PROFESSIONAL BEHAVIOUR

"Am I behaving like a future qualified accountant?" Ask trainees to consider what that would look like and whether they are demonstrating these skills. "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? This increases motivation and engagement.

4. EMBED INTO EVERYDAY CULTURE

Positive tool for growth: Encourage the team to take confident ownership of their development. Include self-reflection as part of work debriefs, both individually and within team discussions.

Create a safe space: Do people feel able to admit mistakes without judgement? This will enable honest reflection and identification of areas for improvement.

5. PEER REFLECTION

Comparing to peers: "How does each trainee match up to their peers?" Look at the general expectation of someone at that level. "How do their skills compare?" What do they need to do to bridge any gaps?"

360 feedback: Consider using this kind of tool to assess whether their opinions of themselves align with what others think. Analyse anonymous feedback from seniors, peers, juniors and external stakeholders.

Check out Specialised Learning courses to help develop your students further in these skills

ASSESSING PROFESSIONAL JUDGEMENT

Use the guides provided here to help assess your students' proficiency level in the skills area of professional judgement as part of professionalism.

What is it?	Key attributes of the skill
• 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.	• Allows informed and ethically sound decision-making. • Balances differing interests of stakeholders. • Applies policies and standards. • Evaluates risks and materiality. • Assists with planning and prioritisation.

Use the example questions below to help guide your discussions with students, adapting and expanding on them as needed.

You should expect students to provide clear examples and evidence of feedback before determining the proficiency level.

Proficiency Level	Examples
Accomplished	• Do they encourage colleagues and junior team members to approach them for guidance and advice? • Do they have examples of making ethical decisions, involving risk, ambiguity or competing interests? • Can they give examples of where they have interpreted accounting standards in complex financial scenarios?
Experienced	• Can they balance conflicting demands, demonstrating sound reasoning and impartiality? • Do they consult with peers and more experienced colleagues when unsure about the implications of a decision? • Do they have examples of where they have questioned financial data due to inconsistencies or anomalies?
Aware	• Can they explain why professional judgement is important? • Can they describe scenarios they have seen where there were no clear answers – how was a decision made? • Do they understand their limitations and when they should ask for help?

DEVELOPING PROFESSIONAL JUDGEMENT

Developing professional judgement in your team, especially in connection with professionalism, involves creating an environment where members 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. PROVIDE REAL EXPERIENCE

Involve in decision-making: Involve trainees in judgement areas. Ask them to research options and draft recommendations. Give ownership of low-risk decisions.

Assign tasks requiring decision-making: Set tasks requiring interpretation, prioritisation or ethical consideration. Avoid purely executionary tasks. This way they get to practise.

2. FACILITATE MENTORSHIP AND ROLE-MODELLING

Shadowing: Allow trainees to sit in client meetings. This is an excellent, hands-on way for them to learn how to handle interpersonal dynamics, communication skills, questions, ambiguity and ultimately professional decision-making.

Pairing mentor and mentee: Match juniors with senior staff who demonstrate consistent, professional judgement. This provides opportunities for trainees to learn how to approach decisions requiring elements of judgement.

3. GROUP DISCUSSIONS

Collaborative learning: Allow team members to share experience and expertise. Encourage ethical deliberation, thinking about alignment with professional standards and values. Promote seeking second opinions when unsure.

Encourage multiple perspectives: This helps to build a shared standard of professionalism and strengthens decision-making skills, broadening thinking and reducing bias. Encourage participation at all levels.

4. EMPHASISE THE USE OF PROFESSIONAL STANDARDS

Use as a starting point: Stress that professional standards provide the foundational principles and structured guidance, establishing the framework for decision-making. Encourage trainees to apply the relevant standards as the basis for navigating uncertainty.

Provide a foundation for judgement: Present decisions as a professional interpretation within the boundaries of established standards. This will enable the team to justify and defend decisions.

5. RECOGNISE GOOD JUDGEMENTS

Acknowledge sound decision-making: Use positive reinforcement which will encourage others. Highlight where a team member has made a well-considered decision, especially in difficult or uncertain situations.

Celebrate ethical integrity: Lead by example in demonstrating ethical considerations in decision-making. Provide constructive feedback and acknowledge good behaviours, even when the outcomes are not perfect.

Check out Specialised Learning courses to help develop your students further in these skills

ASSESSING PROFESSIONAL SCEPTICISM

Use the guides provided here to help assess your students' proficiency level in the skills area of professional scepticism as part of professionalism.

What is it?	Key attributes of the skill
• Having a questioning mindset. • Critically assessing evidence. • Staying vigilant for discrepanices or errors. • Validating information rather than accepting it at face-value. • Persistence in following up inconsistencies.	• Strengthens the credibility and integrity of regulatory reporting. • Helps to detect fraud and prevent errors. • Leads to enhanced public trust. • Supports objective, independent thinking. • Helps in considering risk and underlying problems.

Use the example questions below to help guide your discussions with students, adapting and expanding on them as needed.

You should expect students to provide clear examples and evidence of feedback before determining the proficiency level.

Proficiency Level	Examples
Accomplished	• Do they promote a culture encouraging their team to speak up and challenge reasoning without judgement? • Do they have examples where they have respectfully questioned the decisions of senior colleagues or stakeholders? • Do they consult with colleagues in high risk or complex situations to benefit from differing perspectives and identify blind spots?
Experienced	• Can they describe situations where they have identified discrepancies or issues by questioning evidence? • Do they follow up when answers are unclear or don't add up, being mindful of potential red flags? • Do they avoid making decisions and judgements until they have all the information to hand?
Aware	• Can they explain why professional scepticism is important? • Can they give examples where they have highlighted or escalated something that didn't seem quite right? • Do they readily ask questions to clarify their understanding of concepts and situations?

DEVELOPING PROFESSIONAL SCEPTICISM

Developing professional scepticism in your team, 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. ENCOURAGE A QUESTIONING MINDSET

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

Support respectful challenges: Foster an environment where it is OK to question information or decisions, whether with colleagues or stakeholders, at all levels. Let team members see and understand how to do this mindfully, professionally and without confrontation. It is OK to challenge management assumptions.

2. MAKING CONNECTIONS

Link information: Encourage trainees not to see data and evidence in isolation, but to look wider, at the bigger picture, to understand how the pieces may, or may not, link together.

Use existing knowledge: Promote asking "What has happened in the past?" "Are there patterns?" "What do you already know?" This gives context to expectations.

3. FOSTER SELF-CONFIDENCE

Provide training: Professional scepticism may not be instinctive. Introduce training in how to interview with a probing and curious mindset. This will help to build the personal skills needed for confident questioning.

Use mentors: Let senior team members support trainees by challenging and guiding them as they become more confident in thinking critically.

4. DOCUMENT EVIDENCE

Use checklists: Encourage these as a learning tool for trainees, to guide questioning, reinforce consistency and promote critical thinking. Used well they can support reasoning, especially in high pressure situations.

Create an audit trail: Train team members to maintain detailed records showing how they reached conclusions – based on evidence, assumptions, risks and aligned with professional standards.

5. BE MINDFUL OF FAMILIARITY

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

Team rotation: Switch team members around to avoid complacency when processes and people are well-known. This helps to bring fresh perspective and reduces bias.

Check out Specialised Learning courses to help develop your students further in these skills

Chartered accountants are talented, ethical and committed professionals. ICAEW represents more than 210,000 members and students around the world. 98 of the top 100 global brands employ ICAEW Chartered Accountants.*

Founded in 1880, ICAEW has a long history of serving the public interest and we continue to work with governments, regulators and business leaders globally. And, as a world-leading improvement regulator, we supervise and monitor more than 11,000 firms, holding them, and all ICAEW members and students, to the highest standards of professional competency and conduct.

We promote inclusivity, diversity and fairness and we give talented professionals the skills and values they need to build resilient businesses, economies and societies, while ensuring our planet's resources are managed sustainably.

ICAEW is working towards becoming net zero, demonstrating our commitment to tackle climate change and supporting the UN Sustainable Development Goal 13.

ICAEW is a founding member of Chartered Accountants Worldwide (CAW), a global family that connects over 1.8m chartered accountants and students in more than 190 countries. Together, we support, develop and promote the role of chartered accountants as trusted business leaders, difference makers and advisers.

We believe that chartered accountancy can be a force for positive change. By sharing our insight, expertise and understanding we can help to create sustainable economies and a better future for all.

charteredaccountantsworldwide.com
globalaccountingalliance.com

ICAEW
Chartered Accountants' Hall
Moorgate Place
London
EC2R 6EA   UK

T +44 (0)20 7920 8100
E generalenquiries@icaew.com
icaew.com

Chartered Accountants Worldwide
Member

disability confident
COMMITTED

GAA
Global Accounting Alliance

enei
TIDE
Bronze Standard
2024

ICAEW is working towards becoming net zero