Individual Competence Baseline

Reference guide for Consultants, Coaches and Trainers

Version 1.0

IPMA»
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Owner and author of this document:

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Foreword ICB4CCT

IPMA products have evolved during the last few years to move the project management profession forward. The original version 4.0 of the IPMA Competence Baseline for Individuals (IPMA ICB®), launched in 2015, was followed by the development of the IPMA Project Excellence Baseline (ICB PEB®) and by an update of the IPMA Competence Baseline for Organisations (IPMA OCB®), both in 2016.

IPMA ICB is a cornerstone in the development of a mature set of competences for all individuals working in the domains of project management, programme management and portfolio management. Individuals need to be more proficient in a wide area of competences and deliver in a timely manner in an increasingly complex environment.

But individuals, teams and organisations need to be prepared. This preparation in project, programme and portfolio management is usually done through consulting, coaching and training (CCT). Individuals, teams and whole organisations benefit from these services, significantly enhancing their competences.

The IPMA Individual Competence Baseline Reference Guide for Consultants, Coaches and Trainers (IPMA ICB4CCT®) is the first standard that describes a whole set of competences required to prepare individuals, teams and organisations to improve performance. The standard describes a set of common competence elements (CEs) for all three domains (consulting, coaching and training), and a distinct set of competences for each. These competences address the customer's needs and their expectations of the specific type of work. Consulting the individual is expected to deliver solutions, while the coach is expected to guide the client in a self-discovery process. In training, tools and techniques are provided to customers, rather than specific solutions.

IPMA ICB4CCT is organised in three competence areas:

- **People.** People CEs define the personal and interpersonal competences required to succeed deliver consulting, coaching and training in project, programme and portfolio management

- **Practice.** Practice CEs define the technical aspects of delivering consulting, coaching and training

- **Perspective.** Perspective CEs define the professional environment as well as the client´s environment as these three domains are meant to enable change in individuals and organisations.

The IPMA ICB4CCT Reference Guide describes specific competences that are required for consulting, coaching and training, in addition to the competence required in the domain of project, programme and portfolio management. The latter are not repeated here, they are described in the IPMA ICB4.

The ICB4CCT Reference Guide describes three people CEs, three perspective CEs and three practice CEs as common competence elements. In addition, individuals need to be have specific competence elements for each domain:

- **For individuals working in consulting**, the standard relates to the innovation factor of consulting and restates the importance of benefits realisation

- **For individuals working on coaching**, the standard addresses the design of the coaching, bridging with the specific techniques used in this domain

- **For individuals working in training**, the standard is very thorough in all roles that address every phase of training and not just on the visible part.

We wish to thank the project core team with specialists in the domains of consulting, coaching and training – Sandra Bartsch-Beuerlein (Germany), Tomasz Lesniowski (Poland), Corina Stofer (Switzerland), David Thyssen (Germany), Anja Viehbacher (Germany) and all the many experts that have reviewed and enriched this standard with their valuable feedback. In the long discussions on similarities and differences everyone became more knowledgeable, enriched and with a better global understanding of the professions. During these two years, children were born, family left us and we all supported each other to produce this document. This is why we are the 'IPMA family', as these projects are built by people for people.

IPMA ICB4CCT will help us to achieve a world in which all projects succeed.

Reinhard Wagner	Martin Sedlmayer	Margarida Gonçalves
IPMA President	IPMA VP Products & Services	IPMA ICB4CCT Project Manager

1. Introduction

The IPMA Individual Competence Baseline (IPMA ICB) is a global standard for individual competence in project, programme and portfolio management. In its addition, the new Reference Guide for Consultants, Coaches and Trainers (IPMA ICB4CCT) – now addresses the competences of individuals consulting, coaching and training in the domains of project, programme and portfolio management.

IPMA ICB4CCT focuses on the competences for consulting, coaching and training, bearing in mind that the individuals working in these fields may have to switch between these domains in the course of a single assignment. Having assumed this, two sets of competences have been described – common competences and domain-specific competences. This unique approach makes it easier for individuals who switch between roles in a single assignment or in various assignments.

IPMA ICB4CCT approaches competences with the same structure as IPMA ICB – people, perspective and practice – and identifies a set of common competences that are needed when an individual is delivering assignments to a client and when interacting with other individuals in their field of expertise.

Expectations of these individuals from customers are always high as change is always a desirable outcome of their work. Change takes time, but sometimes assignments are very constricted in their duration and the organisation only perceives the benefits a long time after the assignment is delivered.

To everyone who uses IPMA ICB4CCT we wish you all the best and more challenging assignments! This standard helps you to both achieve the personal growth and to grow of the team(s) with whom you work.

2. The Individual Competence Baseline

2.1. Framework of the ICB

The IPMA Reference Guide for Consultants, Coaches and Trainers (IPMA ICB4CCT) attempts to codify the many faces of competence. It was built around several key concepts, including:

- **Domains**. IPMA ICBs do not discuss competences in terms of specific roles (e.g. project manager or senior consultant), but rather in terms of domain (e.g. individuals working in project management or consulting). The rationale is that roles and role titles vary greatly by language, industry and focus. Therefore, IPMA ICBs present competences important for successfully working in project-oriented environments. Every domain (project management, programme management, portfolio management, consulting, coaching, training) may contain roles and titles that fit into the overall competence domain.

- **Competence areas**. IPMA ICBs contain three areas of competence that form the Eye of Competence: These areas apply equally to all three domains:

  - **People competences** – these consist of the personal and interpersonal competences required to successfully work in project-oriented environments;

  - **Practice competences** – these are the specific methods, tools and techniques used in project-oriented environments to realise success;

  - **Perspective competences** – under this heading come the methods, tools and techniques through which individuals interact with the context, as well as the rationale that leads people, organisations and societies organise work as projects, programmes and portfolios.

- **Key competence indicators** (KCIs) and **measures**. Within each competence area there are generic competence elements (CEs) that apply to the domains. CEs contain lists of the knowledge and skills required to master the competence element. KCIs provide the definitive indicators of successful

performance for the specific domain. Measures describe highly detailed performance aspects within each KCI.

- **Project, programme, portfolio**

  - A **project** is a unique, temporary, multidisciplinary and organised endeavour to realise agreed deliverables within predefined requirements and constraints;

  - A **programme** is set up to achieve a strategic goal. A programme is a temporary organisation of interrelated programme components managed in a coordinated way to enable the implementation of change and the realisation of benefits;

  - A **portfolio** is a set of projects and/or programmes, which are not necessarily related, brought together to provide optimum use of the organisation's resources and to achieve the organisation's strategic goals while minimising portfolio risk.

- **Coaching, consulting and training**

  - **Coaching** is a non-directional form of development for individuals, teams and organisations. Coaching is generally context- and problem-specific and involves enabling the coachee(s) to find an appropriate solution to the actual challenges, using questioning techniques and other coaching models. As a result, the coachee(s) will find their own solution to the challenges they face which will in turn embed the learning and inspire greater confidence to deliver successful outcomes in the future.

  - **Consulting** is a goal-oriented activity. It aims to deliver answers to problems and challenges. Consulting is specific to a situation in a specific context. Consulting is expected to introduce change and innovation of many kinds into the organisation.

  - **Training** is the process of preparing a target audience to solve future problems. Training extracts the topics, which are sometimes based on a specific situation. Training can be a starting point for individual and organisational development. Training transfers knowledge, skills and abilities in a simplified context without having the responsibilities or negative consequences of making mistakes. Training takes place in different settings (i.e. on-the-job training according to the abilities, online training, training sessions).

2.2. Structure and overview of he IPMA ICB4CCT

The IPMA ICB4CCT competences are structured in a set of common competences that apply to all three domains and a dedicated set of competences specific to single domains. To act professionally in the area of project management, competences are required in the domain of project, programme and portfolio management. The latter are not repeated here, they are described in the IPMA ICB4.

The competence elements presented in IPMA ICB4CCT have been structured to align across the domains of **consulting**, **coaching** and **training**.

Consultant

SPECIFIC	
Perspective	Assignment design
People	Guidance
Practice	Consultancy methods
	Benefits evaluation
	Innovation

COMMON	
Perspective	Professional networking
	Client insight
	Ethical, legal and professional standards
People	Communication
	Uncertainty management
	Self-Improvement
Practice	Change support
	Expectations management
	Outcomes

BASIS	
Perspective	Strategy
	Governance, structures and processes
	Compliance, standards and regulations
	Power and interest
	Culture and values
People	Self-reflection and self-management
	Personal integrity and reliability
	Personal communication
	Relations and engagement
	Leadership
	Teamwork
	Conflict and crisis
	Resourcefulness
	Negotiation
	Results orientation
Practice	Design
	Goals, objectives and benefits
	Scope
	Time
	Organisation and information
	Quality
	Finance
	Resources
	Procurement and partnership
	Plan and control
	Risk and opportunities
	Stakeholders
	Change and transformation
	Select and balance

Coach

SPECIFIC	
Perspective	Coaching environment
People	Facilitation
Practice	Coaching models and interventions
	Insights and learning
	Coaching evaluation

COMMON	
Perspective	Professional networking
	Client insight
	Ethical, legal and professional standards
People	Communication
	Uncertainty management
	Self-Improvement
Practice	Change support
	Expectations management
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Practice	Design
	Goals, objectives and benefits
	Scope
	Time
	Organisation and information
	Quality
	Finance
	Resources
	Procurement and partnership
	Plan and control
	Risk and opportunities
	Stakeholders
	Change and transformation
	Select and balance

Trainer

	SPECIFIC
Perspective	Assignment design
People	Guidance
Practice	Consultancy methods
	Benefits evaluation
	Innovation

	COMMON
Perspective	Professional networking
	Client insight
	Ethical, legal and professional standards
People	Communication
	Uncertainty management
	Self-Improvement
Practice	Change support
	Expectations management
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	BASIS
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	Select and balance

3. Common competences

3.1. Professional networking

Definition
The individual strives to build an interdisciplinary network of people. This enables the individual not only to continuously improve, but also to transfer mandates to others when needed. The individual shall encourage the client or sponsor to change the assignment if this would be better served by another form of professional help and consequently engage other or additional subject matter experts.

Purpose
The purpose of this competence element is to build and use such a network to solve the client's issues. It describes how to create alliances to provide a better service to the client while gaining knowledge and experience with the partners involved. Individuals develop a diverse network of contacts which they may access for the benefit of their clients, to seek information and advice or as a source of referrals and introductions.

Knowledge
- Important connections in the relevant field of activity
- Networking techniques
- Referencing
- Relationship management

Skills
- Negotiation
- Social skills
- Analytical skills
- Procurement of services

Related competence elements
- Communication

3.1.1. Establish, maintain and regularly evaluate the individual network

Description
The individual establishes a network of experts with the same and different skills or fields of profession. The individual takes part in other organised networks, associations or similar.

The individual keeps in touch with other individuals and organises their contacts in a structured way.

Measures
- Define experts and organisations that should be part of the network (e.g. according to skills, benefits)
- Actively identify opportunities to make new network contacts
- Provides information and assistance to network contacts
- Stay in touch with the relevant experts
- Evaluate the costs and benefits of networking opportunities

3.1.2. Build new network contacts using networking techniques

Description
A strong network which corresponds to the individual's needs may be vital to the success of an assignment. That is why it is necessary to adapt and modify the network by expansion and change. In order to build a stronger network, it is helpful and necessary to apply networking techniques such as participating in conferences or getting in touch with potential partners.

Measures
- Attends events such as conferences, expert seminars or social events to meet new contacts
- Actively participates in social media
- Proactively contacts new experts of interest
- Maintains a list of contacts on relevant networking services

3.1.3. Select and evaluate the right network partner for the assignment

Description
The individual chooses the network partner best suited to the client's requirements. The individual knows the specialities of the network partners and has defined and agreed to transfer clients if necessary, or to add them as supplementary assignments.

Measures
- Creates and maintains a list of experts and their areas of expertise
- Matches client's needs with the skills of network partners
- Explains the reasons why the match makes sense
- Tests the matching, if appropriate

3.1.4. Choose and enable the involvement of network partners

Description
Clients expect individuals to contribute positively to the overall solution. Sometimes a solution requires the involvement of further network partners. The individual is able to decide who to involve and to suggest to the client when and how to involve network partners.

Measures
- Regularly evaluates the network to fully understand its competences
- Decides on the level of involvement of partners and communicates it
- Checks with the client if the match was successful

3.2. Client insight

Definition
The individual works with organisations, teams in organisations or individuals, bringing different perspectives into play. From interaction with and analysis of each perspective, relevant information can be gained in terms of culture, needs and goals on a personal, contextual and economic level. Such information needs to be kept up to date during the life of the assignment in order to help identify hindrances, conflict potential, opportunities and risk in fulfilling the assignment, together with any need for consultation, coaching and training.

Purpose
The purpose of this competence element is to gather as much information about the client and its environment as possible, to propose a specific assignment and create the foundation for a meaningful assignment design.

Description
Clients can range from departments or organisational units to teams and individuals of varying levels of competence. Insight stems from access to written, verbal and non-verbal communication information. It is the foundation on which the mutual work of the individual with the client is built and should act as a skeleton for the assignment.

Client insight is not only obtaining information but also analysing and applying it. This is an evolving process aligned to the phases and course of the assignment. In gaining and using such information, the individual must obey confidentiality and information protection rules.

Knowledge
- Organisational systems and background
- Industry knowledge and content knowledge
- Market knowledge
- Competitor knowledge
- Benchmarking

Skills
- Listening and comprehension skills
- Questioning tactics
- Summarising skills
- Building trust
- Empathy

Related competence elements
- All other core elements

Key competence indicators

3.2.1. Familiarise with the client business

Description
Before and when entering an assignment, the individual considers profiling the client, e.g. through researching their products, markets, industries, competitors, finances, etc. They should be aware of industrial trends and developments which may influence the assignment's results. This knowledge will help in relating work to the client's organisation and in identifying starting points for further work in the assignment.

Measures
- Understands the client's business model (industry, products, competitors)
- Gathers information about the business structure (e.g. family- owned, start-up)
- Gathers financial information on the client organisation
- Gains knowledge and understanding of the type of business
- Undertakes on-site and off-site research on client's business, its activities and its competitors
- Creates a client profile
- Analyses stakeholders within the organisation
- Creates measures to influence stakeholders positively and maintains the level of commitment when necessary

3.2.2. Identify and evaluate relationships between the assignment and the client's strategy, structure and culture

Description
The context in which the assignment takes place can have a great effect on the progress as well as the outcome. The individual identifies and evaluates the correlation between the assignment and the organisation's strategy, structure, formal and informal culture and its history. This offers valuable information in gauging the gap between the client's expectations and the planned assignment goals, as well as the actual outcomes.

Measures
- Gathers information on, questions or interviews stakeholders and maps key relationships
- Defines and determines criteria for the evaluation
- Matches the assignment design to organisational and individual goals and circumstances
- Deciphers from hidden or sensitive information and clues
- Quickly reassess the given situation and acts upon it
- Uses positive aspects of culture
- Clarifies interaction with governance of the client
- Collects relevant organisational information (e.g. client's history, experience with external experts and advisers)

3.2.3. Analyse client's environment which may impact the assignment

Description
Factual information is collected in order to compile a context analysis of the assignment. This includes current political, economic, social, technological, legal and environmental factors. Context can refer to the organisation's context as well as the department or unit involved. The more relevant the information, the more aware the individual is of potential problems as well opportunities for and reduction of risks.

Measures
- Uses different sources to gain information about the client's environment
- Asks openly and directly about client's environment when setting up the assignment
- Performs a context analysis in preparation of the assignment
- Monitors and regularly updates the context analysis
- Prioritises the impact of the context analysis on the assignment

3.2.4. Identify client need for consulting, coaching and training

Description
Prior to the identification of the kind of the assignment in relation to the client's needs, the individual analyses the current position. It is crucial to the success and outcome to choose the appropriate mix between consulting, coaching and training. In order to find the best match, the individual is able to access and

choose from a wide range of methods and tools. The chosen approach is aligned with the individual's level of competence or of any third party involved as well as with the client's level of competence.

Measures
- Identifies the best suited approaches to fit the clients' strategy, structure and culture
- Defines and determines criteria for the selection process of methods and approach
- Consults with colleagues or partners when deciding on the proper solution
- Researches new methods and approaches to extend the tool kit
- Monitors whether the chosen solution still fits throughout the assignment process
- Assesses the methods using feedback from the clients including satisfaction levels

3.2.5. Establish a confidential client relationship

Description
The foundation for the assignment is based on a trustworthy and secure relationship of mutual respect between the individual and the client. Both need to feel that information, methods and results will be treated in confidence and will not be used for personal gain. Physical protection is as important as information security and needs to have clear rules on access to client premises, people and information.

Measures
- Prepares and signs confidentiality agreement(s)
- Obeys information security rules
- Establishes technical tools for information security
- Handles sensitive data and information with care
- Clearly explains the handling of processes and tools to the client

3.2.6. Negotiate assignment contract

Description
The individual is able to arrange a contract between themselves and the client (sponsor), and between themselves and the involved parties in the assignment. This contract can be used as a fall-back option, for example when discrepancies about context, motivation and goal assurance arise.

Measures
- Prepares and signs contract with client
- Convinces the client about necessary boundaries and settings related to the assignment
- Always settles the contract/agreement with involved individuals specifying conditions necessary for successful assignment fulfilment, including the responsibility for motivation
- Keeps and enforces the agreement with all parties involved
- Is able to create a written agreement for assignments

3.3 Ethical, legal and professional standards

Definition
The individual usually delivers the assignments on the client's premises, dealing directly with the client's employees. To act according to ethical, legal and individual standards positively contributes to the individual's reputation. It is essential for the individual to be regarded as credible in order to influence others. By acting upon, communicating by and showing evidence of these standards, the individual proves himself worthy of being taken seriously.

Purpose
The purpose of this competence element is to enable the individual to act according to ethical, legal and individual standards.

Description
People, groups, organisations, professions and countries are bound by formal and informal rules which differ from assignment to assignment. It is crucial that individuals know which rules to apply and to act according to the legal and ethical context of the assignment. People have their own boundaries as well as the need to be respected and this should be taken into account when delivering an assignment.

Legal matters are also of utmost importance. Individuals must keep abreast of changes that affect their business. In contrast, illegal activities should lead to immediate termination of assignments. All these points are essential to the credibility of the individual or the team of which they are part.

Knowledge
- IPMA Code of Ethical and Professional Conduct
- Individual code of ethics
- Client´s company code of ethics
- Client´s company rules of behaviour
- Specific cultural, geographic and ethnic rules
- Legal and regulatory framework of the country or region where the assignment takes place

Skills
- Being attentive to other people's reactions
- Read and interpret non-verbal communication
- Read and interpret legal guidelines or regulations specific to the assignments' context

Related competence elements
- Expectations management
- Client insight
- Communication
- Self-improvement
- Professional networking

Key competence indicators

3.3.1. Act according to professional codes of ethics

Description
The individual acknowledges and applies a code of ethics in the delivery of the assignment. The individual's professional code of conduct should be clearly stated in the proposal, in kick-off meetings or when requested. These codes may vary according to the context of the assignment.

Measures
- Withdraws from an engagement/assignment that covers or causes illegal or unethical activities
- States the code of ethics of the profession
- Demonstrates knowledge of the laws applicable to the assignment
- Communicates when to deal with ethical controversy, e.g. discrepancies between personal, individual codes of ethics and assignment context

3.3.2. Acknowledge and act according to the cultural environment

Description
The individual should acknowledge and apply cultural awareness while defining and implementing the assignment in a specific customer, company, region or country. Culture may impact the way in which people are involved, meetings are organised, the pace of the assignment and methods of communication. The cultural environment is more often informally acknowledged than formally written and explained to the individual as it is obvious but only to the client.

Measures
- Identifies different formal and informal rules specific to the assignment context
- Raises the topic of intercultural differences within the team

- Negotiates and implements team rules
- Adapts to different cultural settings
- Uses tools to moderate and mediate conflict of interests

3.3.3. Identify and ensure that the assignment complies with all relevant legislation

Description

The individual knows the legal framework of a client and is able to stick to it in the assignment. Furthermore, the individual knows which laws and regulations (civil, criminal, labour, intellectual property, etc.) and common good practices are relevant. The individual has to ensure the assignment operates within legal boundaries and is able to recognise which tasks have special legal impact and what principles apply to it.

Measures

- Acknowledges the legal context and its applications
- Filters out and uses the relevant legal regulations
- Identifies risks in the regulations in relation to the assignment
- Consults other experts

3.3.4. Avoid dependence of the client

Description

The individual is contracted to deliver change to the organisation within the framework of an assignment. However, knowledge transfer to the organisation should not create dependency on the person or the team. The individual should clarify on a regular basis, the level of dependency that the client has upon the assignment or the individual involved.

Measures

- Voluntarily transfers knowledge to the client
- Helps organisations to develop their set of processes to validate adequacy of new processes
- Works with the client on self-supporting tasks and processes by using scenarios
- Positively reinforces the client's newly-developed skills and knowledge and sees that they are put to use

3.3.5. Determine the personal boundaries and professional limitations

Description

The individual is aware of their personal boundaries and limitations, which are related to the way the assignment is conducted. These include social, cultural or even personal attitudes towards what needs to be done. Professional limitations relate to the individual's knowledge, experience and skills on the subject or the domain of the assignment. Any limitations can be overcome with the help of the personal network.

Measures
- Acts on recognition of the limits of personal boundaries
- Creates measures to overcome limitations of personal boundaries
- Reflects on own individual boundaries
- Identifies and acknowledges individual boundaries
- Understands and acknowledges that it's not possible to work with every person on a personal level (personal antipathy)
- Determines whether there is a need for switching roles (between consulting, coaching or training)

3.4. Communication

Definitions
Communication deals with the tools and techniques an individual applies in order to be understood and to fully understand the client. Human interaction is an essential part of the delivery process. In addition, choosing the appropriate communication channels and media is also important.

Purpose
The purpose of this competence element is to enable the individual to choose and apply appropriate communication styles, methods, techniques, channels and media depending on the specific context of the situation and those with whom they are communicating.

Description
This competence describes the different approaches to be applied to maximise efficiency of communication. Whether listening, questioning or communicating in writing, the individual must bear in mind that the assignment is only successful when communication is at its best. Clients expect the experts to listen, to question and to react. They may also expect expert feedback. Most clients are able to recognise if the communication process is effective and if the feedback is appropriate.

Communication is used to establish a common vocabulary, a common set of goals and a common understanding. It conveys the knowledge and skills that need to be transferred, explaining it in different ways (words and language registers) when needed.

Good communication is key to ensuring that the client understands what is being conveyed.

Knowledge
- Questioning techniques
- Interview techniques
- Listening techniques
- Design thinking
- Communication styles
- Communication techniques (e.g. Neuro Linguistic Programming (NLP))
- Assertiveness techniques
- Communication channels and media (e.g. e-mail, internet, intranet, video conferencing, social media)

Skills
- Analysis and synthesis
- Sustainable thinking
- Contextual awareness
- Verbal fluency
- Non-verbal awareness (reading the signs)
- Appropriate body language
- Mastering (electronic) communication tools

Related competence elements
- All People competence elements

Key competence indicators

3.4.1. Provide feedback in a constructive way

Description

Feedback supports personal development. People are more open to revise their behaviour or attitude when feedback is given appreciatively and constructively. By giving feedback in this way the individual avoids assigning blame or finger-pointing. Feedback becomes valuable when it addresses specific actions or behaviours as observation rather than interpretation. The person giving feedback addresses the way it has affected them. Wishes or suggestions can be addressed.

Measures
- Communicates with positive wording in a respectful and open manner
- Applies a non-verbal, non-aggressive style
- Transmits positive feelings
- Helps people to find solutions to problems

3.4.2. Choose and apply appropriate questioning techniques

Description

Questioning techniques are essential to building relationships, ensuring understanding, gathering information and clarifying opinions or options.

Measures
- Uses open and closed questions
- Uses funnel questions
- Uses probing questions
- Uses scaling questions
- When appropriate, uses leading questions

3.4.3. Choose and apply appropriate listening techniques

Description
Communication entails listening as well as transmitting a message. Although active listening is a well-known listening technique, the individual should be aware of barriers to effective listening such as prejudice, eavesdropping and interrupting.

Measures
- Identifies own barriers to effective listening
- Uses active listening techniques such as reinforcement or interest
- Decreases communicator stress levels
- Identifies narcissistic conversation
- Identifies pseudo-listening
- Structures the discussions using techniques as summarising or respectfully interrupting

3.4.4. Choose and apply appropriate interview techniques

Description
An interview is a conversation with a purpose. The use of interviews in assignments contributes to collecting information. To perform interviews efficiently is a reasonable approach to understand the other party.

Measures
- Structures an interview
- Uses listening and questioning techniques when appropriate
- Prepares the interviewee for the interview
- Prepares the interview
- Documents and analyses interview results
- Uses verification or check list to maintain focus of the purpose or objective of the interview

3.4.5. Deal with questions and misunderstandings

Description
Communication is a two-way street. People try to communicate in the most effective way, but the other person may not listen, may not understand or may ask difficult or not understandable questions. People may doubt the message that is being communicated. The individual needs to deal with these questions, verbalised or not.

Measures
- Communicates using different vocabularies
- Expresses ideas through parables
- Provides different explanations about a given subject
- Visualises complex facts

3.4.6. Choose the right channel to communicate with the client

Description
Applying communication competences via a particular channel (such as teleconference, video conference, mail, chat) needs appropriate adjustment. Information received during face-to-face communication, such as body language, may need to be substituted by questioning techniques and feedback loops.

Measures
- Chooses appropriate communication channel according to the situation and client
- Uses assertiveness techniques to establish suitable communication channels for different purposes
- Makes the client comfortable using the chosen channel
- Insists on face-to-face communication when necessary despite the possible economic impact

3.4.7. Build and maintain a common ground with the client

Description

The trust-building process is initiated with building common ground with the client. An assignment flows more smoothly when the client realises they have something in common with the individual. Client insight helps at this stage. If the client mentions something personal (e.g. last vacation, hobby), the individual picks up on it and finds similar interests if it is culturally acceptable.

Measures
- Maintains adequate eye contact
- Identifies similar interests with the client
- Discusses subjects of interest to the client

3.5. Uncertainty management

Definition
Uncertainty especially occurs where future developments are difficult or impossible to predict. Complexity and ambiguity also generate uncertainty. The context is uncertain and prone to change, speed of change is increasing, organisations are dynamic social systems and the assignment itself may contain uncertainty in terms of its process, goals and fulfilment.

Purpose
The purpose of this competence element is to address different approaches to deal with uncertainty in a proactive and supportive way.

Description
Uncertainty is a constant fact of assignments. Individuals are often assigned just because the client finds himself in an uncertain situation and wishes to address that uncertainty.

Individuals need to develop competences to address uncertainty, while keeping goals and objectives aligned. The uncertainty can be diminished over time or, with the correct approach, managed in a way that does not affect personal and organisational outcomes. Resilience is key as well as flexibility and adaptability.

Knowledge
- Resilience
- Reframing
- Questioning
- Complexity leadership theory
- Learning theories e.g. learning curve
- CAS (Complexity Adaptive System) frameworks
- Applied system analysis
- Trial and error method
- Clustering, abstracting and simplifying
- Fuzzy systems
- Scaling and sorting models

Skills
- Analytical skills (e.g. deconstructing, finding patterns, clustering)
- Endure the state of uncertainty/ignorance
- Curiosity

- Deliver a feeling of security in uncertainty to the client
- Decisiveness
- Mirroring the situation
- Recognise critical information
- Dealing at the appropriate level
- Ambiguity tolerance
- Proof by reduction to the absurd
- Related competence elements
- Change support
- Innovation

Key competence indicators

3.5.1. Maintain resilience during the assignment

Description
Resilience is the ability to adapt well in the face of adversity, trauma, tragedy, threats or any other significant source of stress. An individual must be able to quickly recover from difficult situations that occur in assignments.

Measures
- Accepts change as a part of life
- Avoids seeing major problems only as crises
- Develops an attitude to identify opportunities in any event
- Takes decisive actions
- Keeps things in perspective
- Seeks to understand

3.5.2 Demonstrate flexibility and adaptability to changing demands and deadlines

Description
Assignments occur within contexts that change. Individuals must be prepared to adapt processes and schedules to meet changing demands and guidelines. For example, that can mean delay or suspension of the assignment. Flexibility and adaptability must be negotiated and their impact has to be clear to all parties involved.

Measures
- Revises the assignment based on facts and findings
- Revises the assignment based on external context
- Proposes flexible solutions when needed

3.5.3. Identify and reflect on the causes of uncertainty

Description
Identifying the cause of uncertainty is a starting point to address measures and attitudes needed to provide reassurance to the client. It may be a very concrete or a very fuzzy one. Change of perspective, roles or processes can help to understand the cause of uncertainty. These reflections also feed into an action plan to minimise or accept uncertainties.

Measures
- Interprets a factor in more than one way
- Questions others to resolve ambiguity
- Takes decisions with ambiguity present

3.5.4. Identify and deploy methods to help the client to reduce uncertainty

Description
Reducing uncertainty is related to the probability and impact of future events or other influencing factors. These are the two major variables with which the individual has to work. Other methods can be applied according to their specific field of knowledge. In these circumstances, the individual has to ensure that the ability to work is maintained.

Measures
- Identifies influencing factors, relations and complexity
- Applies planning techniques
- Applies risk management
- Manages stakeholders
- Develops contingency plans
- Consciously mashing certain aspects of complexity/reality in order to maintain focus

3.5.5. Identify and deploy methods to help the client to transfer uncertainty

Description
Transferring uncertainty is only possible when other parties are involved. Uncertainty can be shared among those parties and/or totally transferred to one of them. Contractual transfer is an example of uncertainty transfer.

Measures
- Uses contracts as a method to share uncertainty
- Transfers responsibility of actions to partners or other teams
- Delegates responsibility and actions
- Sets up parallel structures or processes

3.5.6. Identify and deploy methods to help the client to accept uncertainty

Description
Assignments may need to be split into smaller units in order to remain manageable. In this way, complexity can be accepted and addressed.

Measures
- Creates checklist of the level of acceptance between defined levels
- Hides uncertainty under familiar concepts to the client
- Actively communicates uncertainty so it becomes familiar
- Delays uncertainty to the future

3.5.7. Share experiences and ideas as options for the client to consider

Description
During assignments, sharing of experience is expected from the individual. Previous experiences enrich the learning process and help clients to better understand that other companies or other industries have addressed similar problems. The individual also shares relevant personal experiences or ideas with the client to broaden the options for a solution.

Measures
- Articulates own ideas at a convenient moment
- Shares own experiences in a way the client may relate to them
- Share ideas that solve more than one problem at a time (abstraction)
- Understands client's issues and shares solutions implemented by others

3.6. Self-improvement

Definition
Individuals strive to become and remain experts in their field of expertise. Change is inevitable in context, knowledge and skills. Individuals that base their assignments on being subject matter experts have to keep their knowledge, skills and abilities up to date. This can be achieved by several different methods. Much of the work of an expert is to contrast their experience with what others are writing and doing.

Purpose
The purpose of this competence element is to enable the individual to further develop their expertise and behaviour fields of consulting, coaching and training.

Description
Change is a reality. Concepts evolve, new theories appear and new data becomes available – clients usually want to know the latest trends. Individuals need to maintain their expertise by learning from their own or other's mistakes to exchange knowledge across industries. Self-improvement implies lifelong learning and the awareness that there is always more than one way to solve problems and to achieve goals.

Knowledge
- Self-reflection techniques
- Self-awareness and self-knowledge techniques
- Strength and weakness analysis
- Learning techniques and styles
- Decision-making techniques
- Time management
- Knowledge management

Skills
- Learning skills
- Self-reflection
- Self-analysis and synthesis
- Self-control
- Researching skills
- Transferring skills
- Studying skills

Related competence elements
- All People competence elements
- Client insight (the professional needs to know about the client's context in order to improve to fulfil requirements)

Key competence indicators

3.6.1. Update knowledge and expertise

Description
Knowledge constantly evolves. What was once valid may no longer be so after a few years. To deliver an assignment, individuals need to balance theoretical knowledge with experience, skills and practice. Sources of knowledge need to be permanently updated.

Measures
- Maintains certifications that are relevant to areas of expertise
- Delivers training, publications or lectures on specific subjects
- Uses networking groups to challenge own knowledge
- Seeks for specific projects where expertise can be applied
- Seeks projects that develop (or expand) own knowledge

3.6.2. Update individual skills, techniques and methods regularly

Description
Individual skills need to be maintained and updated. New methods and techniques appear, new terms are introduced in the individual's language and clients expect individuals to be up to date. New tools appear which require the user to master new concepts and skills.

Measures
- Attends training or other educational opportunities to acquire new skills
- Uses peer events to practice and review   new techniques
- Provides innovative solutions
- Uses vocabulary in an up-to-date way
- Demonstrates new skills by using new techniques
- Demonstrates new methods and techniques to deliver goals

3.6.3. Proactively seek opportunities for further development

Description
Clients resist change. However, many individuals keep to the knowledge, methods and skills that they have successfully used in the past and are also resistant to changes in their own profession. Individuals are aware of this and therefore actively seek professional development opportunities.

Measures
- Undertakes intervision and supervision sessions
- Uses self-reflection techniques
- Is involved in activities to further develop own skills
- Demonstrates new skills through new diplomas and certificates

3.6.4. Learn from own and other assignments

Description
Experiences on assignments always test and enrich the individual's skills and abilities. It is up to the individual to learn from these experiences. Sometimes the learning occurs on the job. At other times, the individual reflects on the assignment and spots behaviours or actions which need to be improved.

Measures
- Conducts lessons learned sessions during assignments, with and without the client
- Seeks feedback from clients, superiors, peers or team members
- Publishes lessons learnt
- Explains behavioural changes according to lessons learnt

3.7. Change support

Definition
Newly developed capabilities only deliver benefits when they are either put to use or when they are supported by the organisations and people receiving them. Change support provides the processes, tools, techniques and interventions that can be utilised to help the client to make successful transition steps resulting in the adoption and realisation of change. In these assignments, the individual brings great benefit to the organisation through an unbiased perspective.

Purpose
The purpose of this competence element is to identify the approach to dealing with needs, requirements and implementation of change either at the client's personal or organisational level.

Description
Change often affects or alters processes, systems, organisational structure and influences people's behaviour. In many cases, an assignment will induce and organise change, but will have ended before the benefits can be realised.

Individuals are often assigned to support the change processes. In many cases, improvements are not only achieved by delivering an outcome, but also require small or large changes in individual behaviour and organisational culture. People usually do not object to change – they object to being changed. Successfully addressing objection or resistance can be done by, for example, building support, addressing resistance and developing the required knowledge and ability to implement the change.

Consulting, coaching or training might be interventions in the change process, but the individuals involved are typically from outside the organisation and are not affected by the change. This provides them a freedom of action that should be used as a positive factor.

The individual needs to regularly monitor and evaluate the effectiveness of the changes and adapt the change design when necessary. He/she also needs to take into account the change capacity, capabilities and willingness of people, groups or the organisation in order to help them successfully adapt or transform. The individual must identify the level of change required and help the client in dealing with the disruption change may create. Lessons learnt from previous assignments are crucial, especially when identifying the approach to be used.

Consulting, coaching or training usually deliver new capabilities. However, it is only when these capabilities are put to use that value is added and benefits can be achieved.

Knowledge
- Theories of change (individuals, groups, organisations)
- Learning styles for individuals, groups and organisations
- Organisational change management theories
- Impact of change on individuals (resistance management)
- Personal change management techniques
- Group dynamics
- Impact analysis
- Actor analysis
- Motivational theory

Skills
- Assessing an individual's, group's or organisation's change capacity and capability
- Intervention techniques for large groups
- Interventions on behaviour of individuals and groups
- Dealing with resistance to change

Related competence elements
- Communication
- Client insight
- Uncertainty management

Key competence indicators

3.7.1. Identify the causes for change to build a reliable basis

Description
The individual uses techniquebdual offers a wider perspective because of their objective view from outside the organisation.

Measures
- Produces and/or performs assessments on needs of organisations in order to identify the causes
- Uses interview techniques or data analysis in order to identify the causes for change
- Considers causes on hidden and contextual information
- Creates documentation that supports the findings

3.7.2. Identify change requirements

Description

Requirements and the assignment's context are analysed to determine which change needs to occur. Requirements sometimes arise out of changes in market conditions, the assignment's environment or other changes. Change requirements will regularly alter, so individuals need to regularly review and adapt the scope of their intervention.

Measures
- Identifies groups and individuals affected by change
- Maps group interests
- Uses interviewing, gathering knowledge, analysis of data or workshops
- Regularly revises change requirements

3.7.3. Assess the client's ability to change

Description

The individual must consider the client's capacity, capability and willingness (ability) to change when assessing the assignment. It is based on the intensity and impact of the change and takes into account the ability to change or the willingness to transform. This is influenced, among other factors, by the success of earlier changes, stress and pressure, the understood need for this change, culture and atmosphere, and seeing good or facing bad perspectives as well as the client's context.

There may also be open or hidden resistance to the proposed change, which negatively influences the adaptability to change. The resistance is less distinct if the individual affected by the change perceives it as positive. In many cases, opposition does not come from the people who are directly affected by the change, but from those who manage them. The adaptability to change is not constant, it will be influenced by factors both inside and outside the assignment.

Measures
- Identifies previous successful and unsuccessful changes in the organisation
- Identifies quick wins
- Assesses possible areas (topics, people, constrictions) for resistance to or endorsement of the change
- Analyses available resources to be able to develop an improvement plan
- Analyses needs for skill development, specific training or areas that need improvement
- Identifies key factors of the contexts (relevant client's history and culture)

3.7.4. Develop a change design

Description
A change design is the architecture, processes and possible interventions to address envisioned changes. For example, these might include workshops, training, information sessions, pilots, serious games or visioning. There will certainly be interventions regarding power and influence and handling resistance. It also considers the timing of changes which should be aligned with organisational and personal dynamics and opportunities.

Change plans can sometimes be planned and structured, but can also be focused on group behaviours, on power, on learning or on emergence. The change design is developed through participation and needs to undergo a regular update. It is helpful to keep in mind which early successes can be generated in order to use them as incentives for further change. It's also important to focus on the sustainability of the interventions in the change design.

Measures
- Collaborates with others to validate the change design
- Documents change design in a comprehensive way, creates an overview of the intended interventions
- Develops a step-by-step approach
- Develops a communication plan with roles and responsibilities
- Analyses training needs
- Regularly adapts the change design to incorporate changes, lessons learnt or benefits that might have been achieved

3.7.5. Support the implementation of change

Description
The individual acts proactively or reactively to guide the client during the implementation of change. For example by providing feedback during the implementation process. Once a change is introduced, measures should be taken to sustain it and to avoid falling back into old behaviour. Change does not happen overnight and it usually takes a while before its value is perceived. Learning, monitoring and assessing what works and what does not in relation to situations and people is also an important part of the design.

Measures
- Addresses resistance to change
- Uses reinforcement techniques to ensure the sustainability of new behaviour

- Develops measures to induce change
- Monitors development against defined goals
- Provides feedback to higher management

3.7.6. Integrate measures for recognising and dealing with resistance

Description
Assignments are meant to induce change. Resistance is a natural reaction to change and must be identified, managed and people should be motivated to embrace change.

Measures
- Recognises the causes of resistance
- Actively manages conflicts
- Motivates people to change
- Opens themes for discussion

3.8. Expectations management

Definition
Expectations management is an ongoing task during any assignment. Goals are established at the beginning or during the assignment. The client and the individual must agree on them. Since the assignment itself or the context of the assignment may be subject to change, these changes can also affect the agreed goals. This is why agreed goals have to be monitored and, if necessary, adapted. Goals provide orientation as well as restrictions to the assignment; and contribute to outlining the assignment.

Purpose
The purpose of this competence element is to enable the individual to manage the assignment according to the agreed goals, the means to achieve them and the expectations created.

Description
Expectations management is the task of defining and adjusting the goals of an assignment to the client's needs according to the strategy defined or drafted for the assignment. An assignment may have intermediate goals which are very different from final goals, mainly when a learning process occurs. Expectations management can be very different and liable to the client´s policies on contracting.
　　Some clients are very strict on goal definition prior to contracting the supporting service. Others like to define goals according to the evolution of the assignment. Some markets, where regulatory issues dictate specific outcomes, force the client to set up expectations management at the very early stages. The balance between what has been contracted and the desired goals should be negotiated with the client. Likewise, the client should bear in mind what is contracted when defining the goals. Expectations management also includes selling the assignment process to relevant stakeholders and establishing necessary roles.

Knowledge
- Pricing
- Definition of key performance indicators
- Acceptance criteria
- Approaches to goal processes
- Specific benefit elicitation techniques (e.g. benefit map, logic framework)

Skills
- Sales techniques
- Negotiation
- Drafting SMART goals

Related competence elements
- Communication
- Client insight

Key competence indicators

3.8.1. Establish goals, outcomes and benefits

Description

In the assignment process, the individual must clarify client goals and outcomes at the outset. If possible, goals and outcomes are defined at a proposal level to minimise incorrect expectations from both parties. It is possible that goals are established at a higher level than the assignment is conducted. For example, training goals can be set without the attendees' knowledge.

Measures
- States assignment goals clearly in the proposal
- Takes action when goals need to be revised
- Alerts on client to problems on goal attainment
- Defines clear outcomes and benefits and relates them to the defined goals
- Conducts workshops for goal negotiation

3.8.2. Clarify interests and expectations of the people involved

Description

In complex environments, goals affect interests and expectations of the involved individuals, stakeholders and the broader organisation. All changes in organisations involve and affect stakeholders and goals need to be aligned with them. Interests and expectations need to be clearly stated in order to define ways to measure their fulfilment. Formal agreements are the best way to clarify interests and expectations but sometimes organisations are not used to work this way. The individual needs to be able to recognise and deal with this appropriately.

Measures
- Reaches formal agreements with the client and sponsor
- Reaches informal agreements with stakeholders
- Conducts workshops to identify expectations of the various stakeholders
- Reaches consensus in interests for a group of people

3.8.3. Balance needs and expectations to optimise outcomes and success of the assignment

Description
After identifying interests and expectations from the different stakeholders, the individual needs to balance them and reassess the outcomes and the process to reach them. Some goals can be achieved sooner than others, inducing a different pace. Some paths through the assignment can be redesigned in order to optimise outcomes.

Measures
- Aligns interests and expectations with what the assignment can actually achieve in order to achieve a balance
- Negotiates a balance between different expectations
- Optimises outcomes through common interests
- Communicates compromises

3.8.4. Promote the assignment, its process and outcomes

Description
The individual is either directly involved in the selling process of the assignment or interfaces with proposals, sales teams and contracting. Promotion is an activity that, being formal at the sales stage of the assignment, only ends after delivery. As in all change processes, selling, convincing, emphasising the importance of the process and outcomes is present throughout the assignment.

Measures
- Explains clearly how the process will lead to the defined goals
- Justifies methods and measures with which the goals should be reached and outcome produced
- Sells the assignment to the client
- Closes deals

3.9. Outcomes

Definition
Outcomes are an important part of successful assignments. Ultimately, what the client perceives and is left with is the result of that assignment. The process of delivery might be awesome or terrible but the end result prevails. The individual regularly reminds clients of the goals and results of assignments, because involved people or teams tend to lose sight of them while working. Results help to focus the work. Often, they help refuel the motivation of teams and the client. That is why a common understanding and commitment to mutual goals and processes are crucial.

Purpose
The purpose of this competence element is to address possible and cumulative attitudes towards achievement of results.

Description
Outcomes keep the assignment aligned with its goals. Individuals must maintain focus and cooperate with clients in order to deliver the results agreed with the client. Assignments can be compromised by stakeholders or by a change of context. In this setting, self-discipline is crucial to keep the results in focus.

Knowledge
*   Results clarification
*   Stress endurance

Skills
*   Focus
*   Endurance
*   Self-discipline
*   Cooperation
*   Mediation

Related competence elements
*   Expectations management
*   Client insight
*   Professional networking
*   Communication

Key competence indicators

3.9.1. Maintain focus

Description
External distractions such as routines, noise and visual distractions are prone to happen in environments that are not familiar to the individual and to the client. Internal distractions can be emotional imbalance, exhaustion or avoiding confronting a specific topic. To maintain focus in assignments is to keep goals in mind and act accordingly. People tend to distract themselves when they do not enjoy the tasks at hand or when the surrounding gets really busy. It is important to listen to others, but directing meetings, interviews and conversations to the previously set goals is essential for the results to show. By maintaining focus, the individual becomes a reliable support to the client and assignment team in keeping an eye on the ratio of useful results to cost.

Measures
- Finishes what was started
- Is aware of which distractions hinder the individual's work the most
- Keeps to the essential
- Identifies distractions for the client
- Turns off or minimises distractions

3.9.2. Show endurance, patience and self-discipline

Description
All assignments contain parts where results are more difficult to achieve than others. Endurance is about being able to keep pushing on an idea, constantly striving for a solution and chasing a goal that is not easily perceived by the client. Patience is needed to provide freedom of understanding to clients until the buy-in is achieved.

Self-discipline in this context is important for not giving up, for maintaining the focus and finding new ways of explaining, getting others on the path that the individual wants them to be on without forcing them. Endurance, patience and self-discipline always need to be considered within the cultural and societal context of the assignment.

Measures
- Uses self-discipline to maintain focus
- Deals with long and stressful situations

- Shows patience while dealing with difficult situations
- Finds multiple ways to communicate the same content
- Keeps calm to ensure stability
- Keeps own emotions under control
- Is always aware of his or her own role in the assignment

3.9.3. Understand the perspective of the client

Description

It is easier for the individual to be result-oriented when he/she understands the context from a client's point of view. This is content-related as well as time-related. Clients may have different expectations of timing for the results than the individual. These different perspectives have to correlate, so they have to be merged.

In order to continue to be effective as external support, the individual has to learn to be a shape and/or role shifter. That means that he/she cannot maintain the client's perspective while working on the assignment. The individual has to shift into the client's perspective, for example in order to carry out quality assurance or expectations management. The individual is then regarded as a critical part of the assignment and solution process.

Measures

- Explains the solution in the client's language
- Recognises the client's approach
- Adapts the message to the client's vision
- Shows empathy for the client's situation
- Recognises his/her own limitations and knowledge of the context
- Estimates the amount of information the individual cannot consider or does not have sufficient insight to do so

3.9.4. Cooperate in order to deliver results and get acceptance for these results

Description
Most results can only be reached with the cooperation of the client. In order to find the required cooperation, the client needs to understand and accept the positive impact of the results on their jobs and their personal goals. The cooperation is crucial in the starting phase of the assignment when a constructive and confident base for the mutual work has to be built. Cooperation is only possible when it is a win-win situation created in a change process for the client supported by the individual.

Measures
- Explains to and cooperates with clients to achieve results
- Uses negotiation techniques to present/deliver results
- Agrees on cooperation
- Balances between assignment goals and his/her own individual goals
- Balances between involvement and own individual, ethical, and/or cultural aspects

3.9.5. Set and maintain pace and rhythm

Description
There is an optimal speed (velocity) and an optimal pace (rhythm) to execute an assignment. If it goes faster than it should it will feel like an imposition on the side of the client. If it goes too slow, it might never break the barrier of resistance. It is up to the individual to set and maintain the correct pace to an assignment in a specific context. Pace and rhythm are also subjected to the cultural and organisational context. These have to be managed in accordance with the individual's own resources.

Measures
- Understands and adapts to the rhythm of the organisation, person or team
- Proposes suitable steps to reach the results
- Works at different speeds and paces
- Sets the optimal pace regardless of the pace of others
- Handles working hours flexibly
- Justifies suitable steps, pace and rhythm

4. Specific competences for consulting

4.1. Assignment design

Definition
Assignment design describes how the success criteria and the context of the mandate are analysed, interpreted, weighed and translated into a high-level design to ensure the highest probability of success.

Design sets out how the mandate will be approached. Phases have to be defined, interventions selected, monitoring and management processes installed and risks and opportunities considered. This leads to a sketch or blueprint of the overall consulting architecture that will later be translated into specific plans and actions. Because the context and success criteria often change over time, this design needs to be reviewed periodically and, if necessary, adjusted.

Purpose
The purpose of this competence element is to enable the individual to successfully integrate all perspective and people aspects, and derive the most advantageous approach for assignment success.

Description
Design is the process of addressing the development, implementation and maintenance of an approach that best serves the objectives and takes into account all formal and informal factors that help or hinder the success of the specific consulting mandate.

Design includes intent, governance, structures and processes, relevant standards and regulations, together with cultural aspects and personal and group interests in the client's organisation and in the wider society. In selecting an approach, lessons learnt from other process changes within the organisation, the industry or from outside, and the specifics of this assignment also play an important role. Aspects such as perceived benefits, motivation and team and stakeholder communication also have to be taken into account. Defining these objectives, factors and criteria distinctly and clearly is a major requirement from the outset and during the execution of the assignment. This activity results in

a thoroughly situational high-level sketch that will later be broken down into specific actions that should lead to the success of the assignment.

The chosen approach also includes the management and control philosophy. The architecture reflects rhythm, balance and commitment, and provides guidance to the component tasks and their place in the assignment.

Knowledge
- Critical success factors
- Success criteria
- Lessons learnt
- Benchmarking
- Complexity
- Project, programme and portfolio management techniques and tools
- Leadership styles
- Strategy
- Triple constraint (iron triangle)
- Performance management
- Organisation assignment design rules and methodologies
- Specific methodologies related to a line of business and context
- Organisational models (e.g. contingency theory)
- Theory of change

Skills
- Contextual awareness
- Systems thinking
- Outcomes
- Improvements by/incorporation of lessons learnt
- Structured decomposition
- Analysis and synthesis

Related competence elements
- All other practice competence elements
- All perspective competence elements

Key competence indicators

4.1.1. Acknowledge, prioritise and review success criteria

Description
Success criteria are measures that stakeholders use to rate and judge the success of an assignment. These criteria can be both formal and informal. Formal criteria include the stated objectives of the assignment. To achieve these goals and objectives within the agreed constraints (e.g. strategic goals, tactical and operational objectives) is just one element of the assignment success. Informal criteria by which interested parties evaluate the outcome are also important. These factors may include the true reasons why a consulting mandate is awarded, supported, thwarted or ended. Success criteria also address the interaction with the larger context – personal or group interests that are influenced by the mandate or its result, depending on how it supports or conflicts with other activities, goals, resources etc.

The individual collects, acknowledges, prioritises and completes both formal and informal success criteria for the assignment. Both sets need to be taken seriously as they will significantly influence the willingness of interested parties to support and cooperate with the assignment and so directly influence its success. The success criteria play a crucial role in defining the approach.

Success criteria are elements that the individual can incorporate into their assignment to increase the likelihood of meeting the success criteria and achieving a successful outcome. These criteria may come from very different sources and take different forms. They vary from using (or avoiding) specific tools, methods or techniques, selecting specific resources, organisation set up, stages, reporting and communication means and styles to quality methods etc.

During the course of every assignment, the relative importance of success factors and criteria may change, due to contextual or social aspects and the dynamics of the assignment itself. Therefore, the individual periodically checks and assesses the actual and relative importance of the success criteria and – when necessary – makes changes in the approach in order to attain success. These changes may even include advising the organisation to prematurely terminate the assignment.

Measures
- Recognises and assesses both formal and informal influencing elements
- Evaluates and prioritises success criteria from each of all contextual aspects
- Performs periodic reassessments of the relevance of success criteria
- Performs periodic reassessments of the relevance of success factors

4.1.2. Establish performance criteria which define the assignment's success

Description
Assignments should create outcomes with which all parties concur. In order to achieve this, it may be helpful to work with the client on agreed baselines and performance indicators to which the assignment should relate. What is acceptable to the client and to the individual should be determined at the beginning of the assignment. Intermediate assessment of the assignment's progress should be carried out by using performance indicators accepted by all parties involved. These identified and agreed performance indicators can refer to quality as well as quantity. They can be derived from indicators adopted in other areas of businesses and industry and from scientific results, as well as organisational baselines (e.g. from quality management, HR evaluation guidelines, etc).

Measures
- Consults established performance indicators and evaluates these for usability on the assignment
- Commits clients to established baseline for success
- Monitors acceptance throughout the assignment
- Organises a two-way assessment of indicators (participants' own perception, objective perception) in order to identify common denominators
- Challenges existing performance indicators and thereby challenges the client/organisation to improve

4.1.3. Determine complexity and its consequences for the delivery approach

Description
To properly select an appropriate approach, the individual has to take into account the specific complexity of the assignment — the complexity of the agreed outcomes and/or of the assignment processes required. The complexity may have

many causes and sources. It may be that the outcomes or necessary internal processes of the assignment are innovative, technically complex and/or strongly intertwined. It may be that the assignment involves many teams, people, suppliers, dependencies, etc. It may be that the context of the assignment is complex, for instance many stakeholders with varying interests; many interfaces with other processes, assignments, programmes, etc. Timelines are short, budgets limited, outcomes crucial for the organisation, etc. All these internal and external factors have to be taken into account by the individual because they may be essential to the optimal approach for the assignment.

Measures
- Identifies the sources and level of complexity of the assignment
- Acknowledges complexity-enhancing aspects
- Identifies and defines the impact on complexity of specific processes, constraints or outcomes
- Identifies and assesses the impact on complexity of specific external and internal parameters
- Assesses and applies complexity-diminishing measures

4.1.4. Select and review the overall consulting approach

Description
At the very beginning of the assignment, the individual chooses an approach that has the highest probability of success, given the constraints of contextual influences and demands, complexity of the assignment, lessons learnt, known success criteria and available success factors. The approach should contain a vision (main principles) and an architecture for the assignment to reach success. This approach may include a high-level definition (or modification) of scope, quality aspects, organisation, communication, documentation, planning and stakeholder approach, choice of resources, risk tolerance, management and performance criteria, etc. The individual reviews the approach periodically, because many of the contextual and social influences may change over the life cycle of the assignment.

Measures
- Assesses and appraises various possible approaches
- Selects an approach for the assignment that has the highest chance of leading to success
- Explains and defends the chosen approach and its relation to the success of the assignment

- Explains the main effects of the chosen approach on the organisation of the assignment
- Explains the main effects of the chosen approach on the organisation
- Periodically re-evaluates the chosen approach in respect of contextual and internal developments
- Makes necessary changes to the approach and explains why these were made

4.1.5. Design the assignment architecture

Description

Based on the selected approach, the individual draws a high-level 'charcoal sketch', a blueprint or an architecture for the assignment. This plan will be detailed later via formalised plans, but the basic design considers the essential choices (e.g. make or buy, waterfall or iterative, internal resources or external, what tools and methods to use, etc.) and the consequences of each choice for success. These choices made by the individual also include the best way to lead the assignment.

Assignment management success is an essential part of, and prerequisite for, success. Depending on the circumstances, this may mean adopting a strong profile as leader or, given other criteria, act as 'first among equals' towards the team or stakeholders. Often this choice will vary with circumstances and environments and/or the phase the assignment has reached. In the course of the assignment the individual periodically evaluates the design, taking into consideration the development and progress of the assignment, changing contextual influences and demands, known success criteria and available success factors. This often leads to minor or major changes in the chosen execution architecture.

Measures
- Establishes the assignment execution architecture with outcomes
- Defines the business rules and control philosophy
- Monitors the assignment against the architecture components
- Updates the architecture based on changes

4.1.6. Define and establish clear roles, responsibilities and boundaries

Description

Focusing on goals is easier when everyone involved is aware of their role, responsibilities and boundaries in the work ahead. The boundaries of each person and the roles of each player at different points of the assignment have to be defined, established and coordinated. People might have different roles during the assignment when compared to the organisational structure, and will be challenged to perform them. It is the responsibility of the individual to coordinate and establish boundaries and roles in order to reach the assignment goals.

Measures
- Structures and delegates tasks
- Identifies the roles needed
- Defines roles and responsibilities
- Sticks to the defined roles
- Supports the other players to stick to their defined roles
- Justifies roles and responsibilities within the assignment, when necessary

4.2. Guidance

Definition
A consultant is an experienced individual with wide knowledge in a specific subject matter area who provides advice to the client. A project, programme and portfolio management consultant is supposed to be an expert in that field, according to IPMA Individual Competence Baseline (IPMA ICB), IPMA Project Excellence Baseline (IPMA PEB) and IPMA Organisational Competence Baseline (IPMA OCB). Guidance includes a set of specific knowledge, skills and abilities which the individual has developed throughout their academic education, on-the-job experience and through training.

Purpose
The purpose of this competence element is to establish credibility and integrity as an individual who provides consulting in the project, programme and portfolio management field. The individual often initiates changes in organisations which influence the work life of others. In addition to the subject matter expertise, the individual needs to have a set of competences which enable an effective and trustworthy relationship with the client and a responsible acquaintance with the initiated change.

Description
The consulting competences support the individual within his/her engagement with the client from the very first contact across a broad spectrum of people, practice and perspective. Additionally, the individual may need to use their own subject matter competence in project, programme or portfolio management to manage the assignment.

Knowledge
- Consulting techniques
- IPMA ICB
- IPMA PEB
- IPMA OCB

Skills
- Project management
- Programme management
- Portfolio management

Related competence elements
- Common competence elements
- Communication
- Uncertainty management
- Demonstrate ethical, legal and professional standards
- Professional networking
- Self-improvement
- All other consulting competence elements

Key competence indicators

4.2.1. Demonstrate reliability by keeping commitments

Description
The reliability of the individual is crucial to establishing a trustful relationship with the client. Keeping commitments and appointments demonstrates reliability.

Measures
- Keeps commitments and appointments
- Delivers as promised
- Appreciates the perception/view of the client

4.2.2. Demonstrate empathy

Description
Listening is one of the most effective ways to demonstrate empathy to other people. Part of showing empathy is being interested in other people. This sort of curiosity is the motivation to understand another person's world. Active listening is listening with purpose and with good eye contact. Paying close attention to the client, staying fully aware and engaged, paying attention to the feelings, expressions and actions of the client demonstrates empathy.

Measures
- Listens actively
- Holds good eye contact
- Reflects back on his/her own emotions

4.3. Consultancy methods

Definition
To be able to consult on project, programme and portfolio management the individual needs to know and apply a substantial amount of methods. Methods to be applied differ heavily on the audience or subject – a single person consulting assignment is very different from a large group change; a technical change is different from an organisational change.

Purpose
The purpose of this competence element is to identify and customise suitable consultancy methods and apply them when appropriate.

Description
Consultancy is a leadership process. The individual is experienced and masters methods that bring the best results for the specific client organisation. The result of a consulting assignment is always a change, either at an individual or at organisational level. The individual is expected to bring knowledge. For that they must perform a good initial assessment to understand the organisation, what needs to change and to identify the best methods to achieve the defined goals. In order to conduct good initial assessments, the individual must be able to master interview techniques, workshops and other methods of participation that enable collection of the necessary information to initiate the change required from the assignment.

Knowledge
- Consulting knowledge
- Questioning techniques
- Workshop management
- Large group dynamics
- Individual methods
- Organisational change
- Brainstorming techniques
- Evaluation methods
- Intervention methods
- Presentation methods
- Written reports
- Consensus building

Skills
- Feedback techniques
- Group management
- Individual feedback
- Communication skills

Related competence elements
- Communication
- Client insight

Key competence indicators

4.3.1. Conduct initial assessments and evaluate the starting position of the assignment

Description

An initial assessment is essential to an effective consulting assignment. Using appropriate techniques to communicate with clients in earlier phases of the assignment, is essential to understand them, the way they react and which techniques will work better with them. The individual may use group techniques such as workshops or individual techniques such as interviews or a questionnaire.

Measures
- Delivers discovery workshops to understand the maturity level of the organisation
- Uses benchmarks or good practice models to assess the maturity of the client
- Interviews stakeholders to understand the organisation
- Develops questionnaires to collect information on the assignment
- Concludes and adapts assignment design according to an initial assessment
- Analyses artefacts (documents, rules, business reports, products etc.)

4.3.2. Consult on organisational change

Description

An assignment may need specific change management methods. The individual needs to identify success factors of change, address employee integration and participation and be able to deal with resistance and resilience. Organisational change assignments need to specifically address communication and values.

Measures
- Measures resistance and overcomes it
- Communicates with all levels of the organisation
- Clearly communicates goals and values
- Deals with resistance

4.3.3. Perform interventions

Description
A consulting assignment is expected to deliver change as quickly as possible. There are a number of interventions available for initiating and supporting the change and they can be combined throughout the consulting process to create an architecture of change.

The definition of an intervention is an action that changes the course of something. Interventions are purposeful actions based on knowledge and understanding acquired and skills learned. Therefore, interventions include knowledge, skills, understanding and values in action. Interventions may focus on individuals, groups or organisations and be in different forms depending on their purpose directive or non-directive and are the toolbox of coaching.

Measures
- Resolves conflicts
- Attains timely results
- Designs and conducts workshops
- Uses team building interventions
- Addresses personnel development

4.3.4. Deal with large groups

Description
An individual with a consulting assignment that deals with large groups of people must use specific techniques designed to deal with these large groups in order to attain the defined goals. The design of the assignment will have to be specific, either using baby step techniques or by prototyping and dissemination. Large groups are more challenging to change, as it is easier for a participant to offer resistance and not follow new procedures.

Measures
- Identifies smaller steps and a path to attain the goal
- Small steps are rewarded and absorbed in day-to-day activities
- Explains large group methods
- Uses prototyping and improvement techniques

4.3.5. Consult upon personal improvement

Description
An individual consulting a single person is expected to advise and provide solutions for a specific field of knowledge or behaviour, equipping the person to gain or develop competences after the consulting assignment. The methods are very different from those used for coaching, when the source of the solution comes from the client, not from the individual.

Measures
- Understands how the person learns and adopts on appropriate learning process
- Measures effective competence development
- Communicates easily with that person
- Creates empathy with that person

4.4. Benefits evaluation

Definition
Benefits evaluation deals with the evaluation of the achievements of the consulting assignment. The benefits are measured against defined values at the beginning or during the assignment. Some benefits can only be evaluated after a certain period of time following the close-out of the assignment, so this evaluation may take place after the conclusion of the assignment.

Purpose
The purpose of this competence element is to evaluate the benefits of the assignment on the client organisation.

Description
Assignment evaluation has to be done at several levels in the organisation — the client's team directly involved in the assignment, the people affected by the results and the sponsors. Even the consulting team should carry out an impartial evaluation of its own work on the assignment, although this is not included in this competence element.

Knowledge
- Business case
- Benefits realisation management
- Key performance indicators
- Evaluation techniques

Skills
- Evaluation
- Impartiality
- Active listening

Related competence elements
- Client insight

4.4.1. Identify benefits

Description
The identification of benefits depends on the clarity of the assignment. It is possible to identify benefits at a very early stage of the design of the assignment, if the client already has them in mind. During the assignment, the individual may identify benefits that were not obvious at assignment start-up, sometimes derived from results not considered in the beginning.

Measures
- Lists benefits of the assignment and updates them on a regular basis
- Understands rationales beyond results achievements
- Quantifies success for the assignment

4.4.2. Establishes performance criteria for the success of the consulting process

Description
Assignments should create outcomes with which those affected agree. In order to achieve this, it may be helpful to work with the client on agreed baselines and performance criteria to which the assignment should relate. This includes what is acceptable to the client and to the individual. All of this should be determined at the beginning of the assignment. It would be helpful to conduct an intermediate assessment of the assignment's progress that is accepted by all parties involved. Identified and agreed performance criteria can refer to quality as well as quantity. Another set of performance criteria can stem from indicators adopted in other areas of businesses and industry and from scientific results, as well as organisational baselines (e.g. from quality management, HR evaluation guidelines, etc.).

Measures
- Consults available performance criteria which are already established within the organisation and evaluates these for usability in the consulting assignment
- Commits clients to established a baseline for success
- Monitors acceptance throughout the consulting assignment
- Organises a two-way assessment of criteria (participants' own perception, objective perception) in order to identify common denominators (especially relevant in larger organisations)
- Challenges existing performance indicators and thereby challenges client/organisation to improve

4.5. Innovation

Definition
Innovation is a result of creative ideas, their evolution process and implementation. Innovation affects people, teams or the organisation as a whole and guides change (e.g. in their processes, behaviour, or collaboration).

Purpose
The purpose of this competence element is to enable the individual to act as an innovation agent during an assignment. The individual, as an external agent, is able to innovation to the client by challenging the status quo.

Description
This competence element deals with the relationship between the individual and the client in the context of innovation. The individual takes action and takes the client to formerly unknown realms (moving outside of a comfort zone). Innovations do not have to be new. They might already be adopted by other organisations but they are new to the client. This competence element does not deal with the question of how the individual becomes more innovative (see self-improvement). Disruptive innovation – innovation that goes after new markets, new customers, new technologies etc – is best built outside of a large company's existing organisation. Innovation always enables change. Change can also happen without innovation.

Knowledge
- Innovation lifecycle models
- Creativity techniques, e.g. developing metaphors, mind mapping, brainstorming
- Chaos theory
- Open innovation

Skills
- Process design
- Product design
- Resilience
- Being open to failure
- Risk prone
- Related competence elements
- Organisational change
- Uncertainty management

Key competence indicators

4.5.1. Search for innovation and identify the possibilities to exploit opportunities for the client

Description
By taking an external view and market overview, the individual can evaluate whether ideas are innovative and should be introduced to the client. The individual is able to identify the added value of introducing innovations to the client.

Measures
- Systematically gathers new ideas by analysing e.g. literature, blogs, or conferences
- Identifies innovation agents to help during the assignment
- Transmits innovative ideas in an understandable way
- Sets innovative goals with the clients

4.5.2. Identify tools and techniques that support the innovation process

Description
The individual must understand the appropriate tools and processes to guide the client through the innovation process, facilitating the disruption on product, process or behaviour. The individual needs to be aware of side tracking, deviations and problems and be able to also have secondary approaches at hand that may lead to the expected results. Some level of instability is to be expected during the process.

Measures
- Uses innovation processes as a means to help the client
- Applies or develops specific lifecycle models
- Uses mind-mapping techniques and tools
- Uses brainstorming as a tool for exploring ideas
- Understands the conditions that lead to innovations

4.5.3. Assess the ability of incorporating innovations

Description
As innovations may be disruptive to the current situation, there is a need to assess whether the client might have the capacity, capability and willingness to

incorporate the innovations and to take corresponding actions. Sometimes it is not possible to truly innovate inside the processes and mindsets of the client organisation and it may be necessary to develop the innovation aspect outside, such as with a university or other specialist organisation.

Measures
- Identifies previous successful and unsuccessful innovations
- Analyses types and characteristics of the innovation
- Assesses possible areas of resistance to or endorsement of the implementation of innovations (processes, markets, people)
- Takes action when the required or expected change is not part of the original assignment

4.5.4 Introduce new themes and perspectives to the organisation

Description
The individual must be able to perform assignments where innovation is introduced to clients. Acting as an innovation agent incorporates the ability to plant seeds, create visions and consciously challenge current ideas and perspectives. This requires specific techniques to turn ideas into action. The individual will have to empower the client (e.g. a local team) and understand the correct techniques to be used to leave the client with the ability to act differently. The individual needs to comprehend the pace of innovation as a characteristic of the assignment, it being a specific feature of introducing innovation.

Measures
- Gathers and finds innovators within the organisation
- Uses various communication techniques
- Identifies the right pace of change process for the client and the interaction with the client
- Identifies and celebrates small steps/quick-wins
- Deals with possible consequences

5. Specific competences for coaching

5.1. Coaching environment

Definition

The individual establishes and maintains an effective coaching process. This includes the appropriate use of coaching models and interventions to create a productive coaching environment.

Purpose

The individual has an overall view and recognises what stage the coaching has reached. With a session environment, the individual has a map where the individual can go many different ways with the client but stays goal-oriented.

Description

The individual creates opportunities for ongoing learning with the client, both during coaching and in work or life situations. The individual, together with the client, focuses on and systematically explores specific concerns and opportunities that are central to agreed coaching goals. The client has the opportunity to explore alternative ideas and solutions, to evaluate options and to make related decisions in the coaching setting. The individual promotes active experimentation and self-discovery, where the client immediately applies what has been discussed and learned to their work or life setting. The individual challenges the client's assumptions and perspectives to provoke new ideas and find new possibilities for action. In this way, the individual advocates or brings forward points of view that are aligned with client goals and engages the client to consider them. The individual helps the client to pursue the 'do it now' approach during the coaching session, providing immediate support. The individual encourages, stretches and challenges but at a comfortable learning pace.

Knowledge
- Theories of coaching
- Knowledge of human nature
- Learning styles for individuals, groups and organisations
- Impact of change on individuals
- Management of resistance
- Personal change management techniques
- Motivational theory, e.g. by Abraham Maslow, Frederick Herzberg
- Coaching and mentoring

Skills
- Analysing a situation or a process
- Paraphrasing, summarising and repeating the client's communication

Related competence elements
- Communication
- Uncertainty management
- Client insight
- Expectations management
- Results orientation
- Use coaching models and interventions

Key competence indicators

5.1.1. Propose and agree on a coaching model and process

Description
The individual proposes a coaching model to the client and they together agree on the coaching process.

Measures
- Derives and/or develops a coaching model that best fits the client's needs
- Explains the coaching process to the client
- Adapts the model if necessary

5.1.2. Perceive and address the intuitive signs in the process

Description

The individual works with the client along the agreed coaching model but is aware of verbal and non-verbal signs and adapts the steps in agreement with the client if the goal achievement is more likely to happen through other process steps.

Measures
- Perceives the involvement of the client
- Analyses the overall processes
- Adapts the coaching process if necessary
- Thinks on a metalevel

5.1.3. Create and maintain a healthy, safe and productive coaching environment

Description

In order to be successful with the assignment, it is required to create and maintain a healthy, safe and productive working environment for the individual/team working on the assignment, if one is not provided. Sometimes, it can be helpful to remove obstacles in terms of cultural or organisational aspects such as misunderstanding, unfamiliarity with terms and methods etc. that can hinder successful work on the assignment. In order to identify the actual need, the individual has to be sensitive to verbal and non-verbal signals.

Measures
- Is aware that working in the organisational setting can call for special handling of sensitive data and information
- Takes corrective actions
- Addresses tension when needed and offers possibilities to deal with them
- Helps to avoid or minimise health and safety risks

5.2. Facilitation

Definition
A coach is a skilful individual who builds and maintains an effective relationship with the client and, where appropriate, with the sponsor. Facilitation includes behaviours and expertise which the individual has developed throughout their academic or on-the-job career. This includes various language registers (verbal as well as body language) and subject matter expertise. The attitude of the individual is crucial when coaching. This includes non-judgemental perception and active listening, respect for the client, empathy and authenticity. Additionally, the individual has to have a positive concept of people and be able to see the strengths and potential of a person or group – not the deficits – which can be developed and used with coaching.

Purpose
The purpose of this competence element is to establish credibility and integrity as an individual who provides coaching. To reach the goals in the coaching process the most important factor, besides the willingness of the client to try out new behaviours or attitudes, is a successful relationship between the individual and the client. To achieve this, facilitation calls for specific competences besides attitude, including building relationships and trust, employing non-verbal communication and emotion management of themselves and of the client to understand and develop the resulting behaviour.

Description
The competence description guides and supports the individual in engaging with the client. A coaching assignment can be to enforce aspects of the personality or social competences of a client, encouraging the insight or learning processes of clients, adopting a different attitude, raising motivation, collaboration with others, optimising self-management or methodological competences. Building trust starts before working on the content, knowing that trust is subjective. In the coaching setting, the individual always treats all people with respect and maintains the client's dignity.

The individual has to understand that his/her actions, behaviours, words and expressions can affect the client. As well as understanding why someone thinks and acts the way they do, the individual needs to realise that someone can best choose how they want to think and act 'in the moment'. The individual can then better understand what motivates the client, how to work cooperatively with them and how to inspire them to reach their potential.

Knowledge
- Communication channels (body language)
- Communication models (e.g. 4 sides model)
- Mimicry and gestures, their cultural meanings and implications
- Knowledge of emotional processes
- Broad vocabulary of emotional states
- IPMA ICB
- IPMA PEB
- IPMA OCB

Skills
- Analysis
- Testing methods for personal strengths and weaknesses
- Synthesis
- Use of exercises and knowledge to capture people's motivation for the assignment
- Building and maintaining relationships through trust
- Communication and collaboration with other individuals
- Use of proper communication channels and methods in line with the communication goals
- Emotional awareness, including the ability to identify own emotions and those of others
- Using emotions and applying them to tasks such as thinking and problem-solving
- Managing emotions, including the ability to regulate own emotions, and the ability to cheer up or calm down another person

Relevant competence elements
- Communication
- Uncertainty management
- Client insight
- Demonstrate ethical, legal and professional standards
- Professional networking
- Self-improvement
- Session environment
- Coaching models and interventions

5.2.1. Employ non-verbal communication

Description
Working with people demands verbal and non-verbal communication skills. The individual must be able to send and read appropriate non-verbal signals, such as body language (e.g. gestures, mimicry, posture) as one method of communication. Often, language is the prioritised means to communicate content. However, the more latent communication takes place through body language. In order to keep the finger on the pulse of the client, the individual must be able to identify, read and interpret the non-verbal communication and respond appropriately. This also includes knowing when and how to use one's own body language to communicate in alignment with the coaching goals and ethics and in responding to the group dynamics. Non-verbal communication is one means to influence mood and motivation.

Measures
- Employs body language as communication tool
- Interprets client's body language appropriately
- Manages non-verbal communication and its channels

5.2.2. Build relationship and trust

Description
In order to establish a good coaching setting, it is essential to build relationship and trust the client. The first step for the client is the first meeting to get to know the individual. For the client, the personal chemistry between the two has to be sound to start the coaching process. The reliability and neutrality of the individual is crucial to the trust of the client in a coaching setting. Keeping commitments and appointments demonstrates the reliability. The only truth which matters in the coaching relationship is the client's perception of it. The individual does not judge the attitude or behaviour of the client.

Building the coaching relationship is a dynamic process which nurtures honesty, trust, reliability and curiosity. The trust-building process implies that the client trusts the individual so that he/she feels they can be vulnerable and open and everything will be alright. The personal chemistry and the basis of trust are very subjective. For most people, one of the most important steps in building a foundation of trust is for an individual to do what they say they will do (commitment). Even if it is a small thing, cancelling or failing to follow through will

create hairline fractures in trustworthiness. Although the occasional failure to follow through may not seem a big deal, repeated failures can add up.

Measures
- Keeps commitments and appointments
- Appreciates the perception/view of the client
- Trust-building process
- Relationship-building process

5.2.3. Demonstrate empathy

Description
Listening is one of the most effective ways to demonstrate empathy with other people. Practicing active listening is listening with purpose and with good eye contact. Pay close attention to the client, staying fully aware and engaged. Pay attention to the feelings, expressions and actions of the client. Reflecting back on one's own emotions is a key part of empathy because it helps the individual client to better understand and regulate their own emotions. This is a common reason why everybody requires empathy from others. Part of showing empathy is being interested in other people. This sort of curiosity is the motivation to understand a little of another person's world.

Measures
- Listens actively
- Holds good eye contact
- Reflects back on one's emotions

5.2.4. Perceive, understand and manage own emotions and feelings

Description
Self-management of emotions does not mean that emotions should not be shown, but the key is to have control over them so that they can be channelled. The individual should be competent enough to perceive and identify what is the specific feeling, make an honest determination of the underlying cause and take action to break the cycle of negative emotions or to redirect the emotion.

Measures
- Is aware of own emotions
- Relates emotions to underlying causes
- Adapts own feelings appropriate to the situation

5.2.5. Perceive and integrate the client's emotions and feelings

Description

The individual is competent to perceive and identify the specific feeling of the client at the moment of interaction and concerning past incidents, make a non-judgmental study of the underlying causes and support the client to break the cycle of negative emotions or to direct the emotion in a different way.

Measures
- Recognises facial expressions
- Reacts with non-judgmental questions
- Knows methods to change negative emotions to direct the emotion in a different way (e.g. reframing)

5.3. Coaching models and interventions

Definition
Coaching integrates many fields of knowledge, so it is likely that many theories and models are adapted for coaching. Coaching models are methodological lines of actions in the process of coaching a person or a group. A coaching model is a framework that shows the underlying structure that can be used when coaching someone. It allows to see the battlefield, increasing the ability to respond adequately to any coaching situation. Learning from different coaching models has definite value, as not one model has all of the answers to all of the challenges one will be faced.

The definition of an intervention is an action that changes the course of something. Interventions are purposeful actions based on knowledge and understanding acquired and skills learned. Therefore, interventions include knowledge, skills, understanding and values in action. Interventions may focus on individuals, groups or organisations and be in different forms depending on their purpose directive or non-directive and are the toolbox of coaching.

Purpose
Coaching models are tried and tested methods to proceed and are reasonable steps to lead people towards finding their best solution possible.

Description
Coaching models and interventions are the methodological paths to reach the goal of the coaching assignment. It is always a dynamic rather than a linear process and it calls for the creativity and intuition of the individual.

Knowledge
- Coaching models and techniques (e.g. The What-IS-Coaching model, scaling technique, motivational Interviewing, GROW coaching model, systemic coaching)
- Coaching models and interventions
- Questioning techniques
- Concept of metaphoric exploration
- Concept of reframing

Skills
- Focus
- Endurance
- Self-discipline
- Cooperation

- Contextual awareness
- Verbal fluency
- Non-verbal awareness (reading the signs)
- Analytical skills (e.g. decomposing, finding patterns, clustering)
- Endure the state of uncertainty/ignorance
- Curiosity
- Decisiveness
- Dealing at the appropriate level/recognise critical information – what do I/we have to know?
- Ambiguity tolerance

Related competence elements
- Communication
- Assess the ability of the client to change
- Uncertainty management
- Client insight
- Expectations management
- Outcomes
- Regularly update professional skills, techniques and methods
- Learn from own or other assignments

Key competence indicators

5.3.1. Use multiple established tools and techniques to help the client to work towards an outcome

Description
The individual bases the approach on a model or framework of coaching and develops a coherent model based on the thematic and personal aspects of the coaching situation. The individual connects and combines various models and techniques and new ideas into an adequate model.

Measures
- Uses established coaching models and techniques
- Acknowledges the context and the adequate use of a coaching model or technique
- Evaluates through questionnaires (coachees' view) or feedback sessions

5.3.2. Explain and work with models from the client context

Description
Not every coaching model suits every person or situation. The individual takes into account their own way of thinking and working and the client context. The individual is able to choose the best-fitting model, possibly adapt it and explain the model to the client.

Measures
- Explains coaching models
- Applies and, if necessary, adapts the most appropriate coaching models

5.3.3. Broaden the conversation with the client

Description
Metaphors and analogies are helpful to illustrate or translate a situation, a problem or a relationship with emotional, verbal and/or physical symbols. Individuals can listen to how clients use symbols, stories and objects which describe their situation and then follow those metaphors to generate new ways of thinking about their life and the situations in which they are working. Drawing attention to the metaphors broadens the conversation to explore what it would be like to experience the situation differently, and often offers a transformative breakthrough in their perspective.

Reframing is viewing the current situation from a different perspective, which can be very helpful in problem solving, decision making and learning. Reframing is helping another person to more constructively move on from a situation in which they feel stuck or confused. The aim of reframing is to shift one's perspective to be more empowered to act – and to learn at the same time. Often, reframing the perspective can also help people change how they feel about the situation.

Measures
- Addresses the client using metaphors while speaking
- Invites the client to use metaphors, symbols or analogies to talk about a topic
- Uses metaphors, symbols or analogies to go deeper into the topic and generate solutions or approaches with and for the client
- Addresses appropriate questions
- Applies the concept of reframing
- Formulate alternatives

5.3.4. Let the client set the agenda for the coaching sessions

Description
Once the client sets the agenda, the individual takes responsibility to focus the conversation and pushes it towards action. The fact that individuals do not direct the conversation does not mean they are passive. They help the client think more clearly, to push, to go deeper and reach higher. The individual manages the flow of the coaching conversation so it moves the client forward towards the goals and makes sure the client arrives at a set of concrete, committed actions. Keeping the client in charge of the coaching relationship is a challenge. A great way to reinforce the client-centred principle is to build structures into coaching relationships that reinforce this ideal.

Measures
- Uses listening, powerful questions and appropriate other techniques to move clients forward towards their own goals
- Provides the structure needed to stay focused on the chosen agenda
- Tracks the process over multiple appointments
- Manages the time

5.3.5. Use questionnaires and/or self-assessment profiles for better self-understanding

Description
Most of the time, self-perception is not always congruent with how others perceive that person. Analysing the gap between a self-assessment and feedback from others can be done by developing personality or behaviour or by questionnaires with a comparative random sample. This way, the client has a solid base for self-reflection. The individual supports the client during this process.

Measures
- Selects and applies reliable questionnaires or self-assessments
- Decides when to apply which instrument
- Explains the use and interpretation of the results of the instruments

5.3.6. Analyse artefacts

Description
Artefacts are noticeable structures and processes in organisations such as images, symbols and buildings. With analysis of these artefacts, a situation or problem of

the organisation or of a member of the organisation offers the possibility to see a problem from another perspective and provides additional information how to deal with the next steps.

Measures
- Identifies artefacts in the clients environment
- Offers the method of analysis of artefacts to the client
- Explains how this method works

5.3.7. Find out what hinders and motivates change

Description
The main influencing factor concerning success is the motivation of the client to change attitudes or behaviour. The individual uses different techniques to rouse and influence the change and to support the process, but in the end it is the person himself who decides to try out new ways. This different kind of acting or thinking uses energy and the individual provides techniques to encourage this. One aspect is to find out what hinders and motivates change in the specific person and, with exercises and questioning techniques, they will discover the underlying causes and can work towards the transformation.

Measures
- Adapts exercises to explore underlying causes to motivate change
- Uses questioning techniques to gain information about the client

5.4. Insights and learning

Definition
Working with the client and sponsor is about gaining insight and learning about the situation or the problem. Insight is mostly enabled through purposeful interventions such as questioning, changing the focus or obtaining another point of view.

Purpose
The essential learning process in a coaching assignment is the change of a habit, a (set of) behaviours or attitude/approach.

Description
In a coaching assignment, the client needs to gain insights into his / her thoughts, understanding, perception, ways of doing etc., in order to learn and develop. With adequate interventions, the coach facilitates this process with the client.

Knowledge
- Coaching interventions
- Human learning processes

Skills
- Ask suitable questions in the coaching session
- Focus on learning steps and relates that to the client
- Encourage the client to reflect on changes of habit, behaviour or attitude in the specific situation/problem/topic

Related competence elements
- Communication
- Uncertainty management
- Client insight
- Expectations management
- Results orientation
- Use coaching models and interventions
- Session environment

Key competence indicators

5.4.1. Create reflection situations for the client to learn and gain insight

Description
A common moment in the coaching situation is when the client realises that they have changed their behaviour or attitude and got closer to the solution or goal. So it is essential for the individual to establish such moments of reflection for the client to gain the insight and to start the learning processes.

Measures
- Asks questions on a metalevel
- Asks questions which stimulate insight and learning

5.4.2. Encourage the client to use a log or reflection note to reflect on learning

Description
Insight and learning processes are very subjective and essential in the coaching situation. To give them the appropriate emphasis and to document the processes it is helpful for the client to write down their learning steps in a personal log book.

Measures
- Explains to the client why and how to use a logbook
- Instructs the client to write down the insights and learnings

5.5. Coaching evaluation

Definition
The evaluation of the coaching process includes the establishment of performance criteria and the review of the defined goals with the sponsor, client and individual and also the review of the effectiveness of coaching processes and the impact on outcomes and results.

Purpose
Evaluation is necessary to review the success and the effect of coaching, sometimes for phases as well as at the end of the process. An additional possibility of feedback and learning for the client and the individual will also arise through evaluation.

Description
Since changes that happen at individual and organisational levels are mainly behavioural, it makes sense to focus on the perceptual measures available. The impartial evaluation contains a self-assessment of the client concerning the defined goals and the assessment of the sponsor and the individual concerning the achievement of the objectives of the client. The contribution of the individual to the achievement of objectives should also be assessed. Normally the use of a questionnaire is a good method for the evaluation.

Knowledge
- Questionnaire methods
- Quantitative and qualitative statistics
- Questioning techniques

Skills
- Focus
- Identify success criteria
- Select evaluation methods
- Demonstrate outcomes

Related competence elements
- Expectations management
- Client insight
- Communication

Key competence indicators

5.5.1. Establish performance criteria which define the assignment's success

Description
The individual establishes performance criteria based on the processes and the client's business as the baseline for success. In order to achieve the defined outcomes, it is helpful to work with the client on agreed baselines and performance criteria, to which the assignment should relate. What is acceptable to the client and to the individual should be determined at the beginning of the assignment. In this way, it will be helpful to carry out an intermediate assessment of the assignment's progress which is hopefully accepted by all parties. These identified and agreed performance criteria can refer to quality as well as quantity. Another set of performance criteria can stem from indicators adopted in other areas of businesses and industry and from scientific results, as well as organisational baselines (e.g. from quality management, HR evaluation guidelines, etc).

Measures
- Consults available performance criteria which are already established within the organisation and evaluates for usability for the coaching assignment
- Commits clients to established baseline for success
- Monitors its acceptance throughout the assignment
- Organises a two-way assessment of criteria (participants' own perception, objective perception) in order to identify common denominators (especially relevant in larger organisations)
- Challenges existing performance indicators and thereby challenges client/ organisation to improve
- Creates a working atmosphere at all times

5.5.2. Review progress and performance with clients at agreed intervals

Description
From the beginning of the mandate, the individual defines the intervals when evaluation of the coaching progress will be reviewed. At the agreed intervals, the individual initiates the review with the client and the sponsor.

Measures
- Documentation of the achievement of the defined objectives
- Involvement of the client and the sponsor in progress and performance review

5.5.3. Evaluate the effectiveness of coaching processes and the impact on outcomes and results

Description
Coaching outcomes are not easy to measure, there are several significant factors that can impact the outcomes. The influences arise from the individual and the client as well from the organisation itself. The individual gets feedback from the client and the sponsor on the effectiveness of the coaching processes and the impact on outcomes and results. The individual should provide their assessment of the results achieved to the client and sponsor. Sometimes it makes sense to use quantitative as well as qualitative measures.

Measures
- Analyses the situation and processes of coaching
- Addresses his perception to client and sponsor
- Uses evaluation tools

6. Specific competences for training

6.1. Training context

Definition

Training context encompasses methods and techniques, the use of media and the combination of these –didactics design – in order to reach learning and/ or training goals. This transmits knowledge and enables skills development in a guided process conducted by the individual.

In addition, training context entails instructional design as systematic planning, development and evaluation of environments in which learning takes place as well as systematic planning, development and evaluation of learning/ training materials. All of these aspects are based on a thorough assessment as preliminary work which offers input in order to create a successful goal-oriented training design.

Purpose

The combination of the methods, tools and techniques should result in positively enhancing the delivery of content. This competence element describes the basis of creating an effective training programme in an effective learning environment through the choices made in instructional design, in classroom management and through expectations management.

Description

This competence describes the formal development of training design taking into consideration the sponsor's requests, the participants' training needs, personal strengths and weaknesses in combination with current methods and didactics (instructional design) of adult training and learning.

Designing the training begins when training goals are defined and the client has been assessed, coupled with the educational expertise of the individual and the training setting provided by the client. Training design needs adaptations when changes happen. This might occur during a training session or when assessment results show discrepant information compared to the client's briefing.

In order to create a well-rounded training design, much focus needs to be on the assessment which identifies gaps in skills, abilities and competences of the client.

Methods of assessment vary from online tools to filling out a paper questionnaire, performing tests, making observations, taking part in role play etc. Each assessment tool has its specific outcome orientation as well as strengths and weaknesses. If no assessment has been done prior to the training session, there must be time allotted for this at the beginning of training. In this way, the individual will get the most current information about their group of participants. Sources of current training design tools and analyses include academic and scientific articles, papers and publications, and lessons learnt activities with training partners.

Knowledge
- Benefits realisation management
- Tools, methodology for transmitting content
- Use of media as well as media channels
- Strengths and weaknesses of media, tools and methods
- Didactics/instructional design
- Learning and/or training theory
- General project, programme and portfolio management expertise
- Learning phases
- Criteria of adult learning
- Criteria of lifelong learning
- Analysis of assessment data
- Assessment procedures
- Analysis of assessment methods and tools for clients and participants
- Scoring and rating methods (rubrics)

Skills
- Combination of didactics and methods
- Ability to justify chosen approach to the client
- Cross-checks the instructional design and requirements of the training environment, e.g. client's environment
- Adapts the training design to actual training setting
- Extracts (transfers) training content from the client's actual situation/problems
- Creates precise working instructions
- Detect interfaces between methods and tools in order to connect to client's learning history/experience in the training session
- Quick awareness of the client
- Draws efficient and effective conclusions from a context analysis
- Creates an assessment process

- Draws efficient and effective conclusions from data generated by the assessment according to the client's needs in order to provide engaging and effective training

Relevant competence elements
- All training competence elements
- All common competence elements

Key competence indicators

6.1.1. Explain and justify assessment procedures

Description
Assessment is considered a sensitive topic. In order to reach the best assessment output, everybody involved should understand the goals and methods as well as the expected outcomes. Sometimes assessment procedures for training and personal and/or project, programme and portfolio management competences are unknown to an organisation. In order to minimise scepticism as well as resistance, assessment procedures have to be introduced and clearly explained. This helps to minimise disappointment as well as obstacles when starting an assessment. Explanation and justification should be provided whenever necessary.

Measures
- Convinces client/participant to accept the assessment method
- Convinces client/participant to accept the assessment procedure
- Signs off on the assessment method and procedure

6.1.2. Apply different assessment methods

Description
Depending on the organisational and personal exposure to the assessment, the individual needs to be skilled and/or trained in applying different assessment methods. Assessment is used to gain information about competence gaps according to the organisation goals. Individuals may have preferences for an assessment, however not every method or approach is suitable for the situation at hand or to the organisational context and culture. To be most effective, assessment methods are targeted towards training goals. The individual should show proof that they are able to apply assessment methods which fit the client, the organisational context, prior experiences of the participants and the willingness to engage.

Measures
- Weighs pros and cons for each assessment method
- Chooses and aligns assessment tools to client's/participants' goals and needs
- Employs methods for group assessment
- Employs methods for individual assessment

6.1.3. Provide documented assessment results

Description
An Assessment is only as helpful as its documented results. The client and the individual should agree on documented assessment results for the benefit of the client, the organisational context as well as the personal goals and motivation of the participants. This documentation shows the assessment process, justification for the chosen approach as well as interpretation and suggested measures targeting further development. This documentation can be provided in any form appropriate to and aligned with the communication strategy between the client and the individual, such as handwritten forms, electronic formats, charts or prose text.

Measures
- Meets sponsor's/client's expectations (self-perception/perception of third party)
- Draws proper conclusions from the data generated from assessment
- Provides result documentation for the sponsors
- Signs off on assessment results and training goals

6.1.4. Prepare training related documentations and materials

Description
The individual creates documentation around the training design and session, such as training plan, training manual, agenda, syllabus and testing formats. This documentation can be used to either explain or justify the chosen approach, methods and instructional design when communicating with the client or used in communication with the participants. Documents such as the training manual contain all relevant information in terms of approach, methods, instructional design, assignment goals and means, training philosophy etc. This documentation needs to be updated when changes occur throughout the training. This documentation aims to make training sessions more transparent and therefore contributes to confidence and a positive training environment. For the individual, this documentation can be used as guidance throughout the training programme and sessions.

Measures
- Creates and updates a training manual
- Prepares documentation set-up to be used after each training session in accordance with the client's needs/requirements (in hard copy or an online learning platform that can be accessed by the client)
- Plans and creates exemplary tests
- Creates context/descriptions for assignments/tasks
- Creates case studies based on client's circumstances
- Provides a daily agenda and/or training syllabus
- Keeps checklist updated in order to organise trainings in accordance with the methods

6.1.5. Select methods, tools and media to provide training according to the contextual framework

Description
The individual knows and uses different learning methodologies, supportive tools and media in order to provide engaging and effective training geared towards the training goals of the client. The individual creates a set of criteria in accordance with the training programme to enhance effective training.

The individual needs crucial information in order to compile the training programme best suited to the client. This includes information in terms of training goals, the participants' educational experience, known methods and means based on prior trainings, etc. The essence of it is used as a basis for choosing the tools and methods for each topic and the training goal to be reached. While doing so, the individual also keeps in mind that alternatives may arise before training begins.

Measures
- Applies different methods, tools and media to be used in training sessions
- Switches between methods in order to respond to the training situation
- Modifies the content in relation to the client's needs
- Answers questions on how training content is arranged, what components of content are needed in order to meet the training goals and reach the development goals
- Answers questions about which content (width and depth) is needed and in which order and which evaluation form is needed in order to develop knowledge, skills, abilities of participants

6.1.6. Combine tools, media, methods and didactics in order to reach learning goals

Description
The individual draws from a wide range of exercises, methods and tools when tailoring a training programme geared towards the client's needs. The individual keeps in mind that changes to it might be necessary in the course of the assignment. The individual also updates the information (e.g. which methods are not tolerated by the client). When working with adults, it is important to keep in mind that environmental factors (e.g. distraction, supporting factors, break times) play a big role and need to be observed when creating a didactical–methodological approach of the training assignment.

Measures
- Receives positive feedback from the client and the participant(s)
- Matches tools, media, methods and didactics with participant's project, programme and portfolio management context and training goals

6.1.7. Adapt the layout of the room and its logistics

Description
The environment in which training takes place is crucial to the success of the training session and how goals are met. If the training environment is not supportive to how the training is set up, then this can become an issue. That is why the individual should familiarise him-/herselfe with the training room(s) as well as the associated logistics (rest rooms, break rooms, office services, etc.) to minimise distraction and disruptive factors.

Measures
- Ensures that the conditions of the training venue are supportive to the training session
- Always has enough time to check and change, if necessary, the arrangement of training room (chairs, tables, size of room, equipment, etc)
- Uses and maintains checklist for classroom logistics

6.1.8. Create and maintain a healthy, safe and productive training environment

Description
In order to be successful with the assignment, it is important to train in a healthy, safe and productive environment. Sometimes, it can be helpful to remove

obstacles in terms of cultural or organisational aspects such as misunderstanding, unfamiliarity with terms and methods, etc. that can hinder successful training.
In order to identify the actual need, the individual has to be sensitive to verbal and non-verbal signals.

Measures
- Is aware that working in the organisational setting can call for special handling of sensitive data and information
- Respects peoples' boundaries (mental, emotional, physical) and personal comfort zones when providing training
- Addresses tension when needed and offers possibilities to deal with them
- Helps to avoid or minimise health and safety risks when providing training
- Creates a working atmosphere at all times

6.2. Transfer

Definition
A trainer is an experienced individual who transfers knowledge to a client. This competence element presents a set of behaviours, characteristics, expertise, manners, and/or rituals which the individual has developed throughout their academic, on-the-job, or other training. This set also includes various language registers (verbal as well as body language) and subject matter expertise in order to respond to and manage the scenarios to which they are exposed during training. This set is individual to the trainer and can overlap with other personal characteristics.

Purpose
The purpose of this competence element is to establish credibility and integrity as a trainer. A well-rounded training individual encourages learning, raises motivation and participation. It is about creating and developing one's own set of characteristics as a trainer in accordance to the training setting and organisational context.

Description
The transfer competences support the individual within their training with the client from the very first contact across a broad spectrum of people, practice and perspective. The individual transfers their own subject matter competence in project, programme or portfolio management to provide the training.

Knowledge
- Benefits realisation management
- Knowledge of individual network
- Communication channels (body language)
- Communication models (e.g. 4 sides model), mimicry and gestures, and their cultural meanings and implications
- IPMA ICB
- IPMA PEB
- IPMA OCB

Skills
- Analysis
- Testing methods for personal and individual strength and weaknesses
- Synthesis
- Use of exercises and knowledge to capture people's motivation for the training

- Building and maintaining of relationships through trust
- Communication and collaboration with other individuals
- Use of proper communication channels and methods in accordance with the communication goals

Related competence elements
- Core elements which are directly related to the professional
- Uncertainty management
- Demonstrate ethical, legal and professional standards
- Communication
- Professional networking
- Self-improvement
- All other training competence elements

Key competence indicators

6.2.1. Employ non-verbal communication

Description
Standing in front of a group of people demands verbal and non-verbal communication skills. The trainer must be able to send and read appropriate non-verbal signals. The individual may use body language (e.g. gestures, mimicry, posture) as one channel to communicate with the client (group of participants, sponsors, co-trainers). Often, language is the prioritised means to communicate content. However, the more latent communication takes place through body language. In order to keep the finger on the pulse of the training group/client, the individual must be able to identify, read and interpret the non-verbal communication and respond appropriately. This also includes knowing when and how to use one's own body language to communicate in alignment with the training goals and ethics and responding to the group dynamics. Non-verbal communication is one means to influence mood and motivation.

Measures
- Employs body language as communication tool
- Interpret client's body language
- Manages non-verbal communication and its channels, including in written speeches.

6.2.2. Use and develop own versatility

Description

The individual finds him-/herself in situations where no plan is made to cover the situation. In order to master this setting successfully and in alignment with an engaging and effective training philosophy, the individual has to draw on their own versatility and resourcefulness. This can entail adapting the planned training session to the setting at hand as well as handling a highly complicated situation in an individual manner. The profession may involve different disciplines of science and industries. That is why the individual should have access to a wide range of industries and subject matter competences and can present themselves as open to constant self-development and personal learning progress.

Measures
- Proves versatility in different content areas, e.g. engineering, social studies, management
- Applies questioning methods in order to identify the obstacle
- Conducts self-analysis on deviations from or changes of training session/plan
- Provides and applies content examples according to the client's background

6.2.3. Hold and maintain concentration and self-motivation

Description

Any training session is influenced by the presence of the individual on the client's concentration and attention span. The individual needs to be energetic and holds the concentration over a long period of time to help the client to focus on the training session at hand. The same influence works the other way around. If the individual is distracted and not attentive to the client, then it will affect the group dynamics in a negative way. Holding and maintaining concentration and attention between the client and the individual is crucial to creating a positive, engaging and effective training environment as well as gearing up the group dynamics for the training activities.

This positively influences the concentration span of the group and by that the group dynamics at hand.

Measures

- Observes own limits in the overall training days per year in order to prevent burnout/excessive work and routine
- Paces themselves when participating in group dynamics or negotiations with the sponsor
- Observes and reads clients' signs in order to gauge reactions and attention span and initiates means to change it, e.g. to prevent automatic assent

6.3. Training design

Definition
Training design is the combination of transferring knowledge at the time of training design, the tasks the individual has to fulfil while enabling an increase of participants' knowledge and skills in line with customer expectations and the objectives of the organisation. It takes account of the impact of the training venue and arrangement of the training room on final result of the training process.

Purpose
The purpose of this competence element is to define the individual's tasks during the training, enabling participants to acquire knowledge and skills defined in the training objectives. It also serves the purpose to enable the individual to create optimal conditions that allow participants to acquire knowledge and to guarantee the highest possible effectiveness of the training process.

Description
Training design puts the training process into action. The individual faces the challenge of how to effectively transfer knowledge in accordance with defined needs. This often requires revision of the prerequisites by modifying the content, changing methods of knowledge transfer or the language used. The set-up at the training venue have significant impact on the effectiveness of the educational process. Proper placement of the training (on or off site), the size of the training room, table settings and the use of teaching aids. These factors contribute to achieving the training objectives almost to the same degree as the subject matter of the training itself. The individual should ensure that participants have optimal conditions during training and should make immediate changes when needed.

Knowledge
- Teaching methods
- Benefits realisation management
- Questioning methods
- Communication channels (body language)
- Communication models (e.g. 4-sides model), mimicry and gestures and their cultural meanings and implications
- The influence of various factors on the process of knowledge acquisition

Skills
- Cooperation
- Problem analysis
- Managing group processes
- Reading non-verbal language
- Techniques to capture motivation
- Building and maintaining relationships through trust
- Use of proper communication channels and methods in accordance with the communication goals
- Use of equipment in training room to achieve various teaching purposes
- Selection of the place of training in accordance with the training programme and objectives

Related competence elements
- Transfer
- Training design
- Audience engagement
- All core competence elements
- Classroom engagement

Key competence indicators

6.3.1. Adapt content to the training setting

Description
The training programme and content are based on an assessment of needs. Both sometimes have to be modified in the training situation when the actual level of participants' competences differs from the declared level (e.g. from the client or the participants themselves at the start of training).

The individual must be ready to modify and/or correct the knowledge transfer immediately during the training (e.g. right after the course starts). They have to transfer knowledge that will satisfy the client's/participants' needs. It definitely requires vigilance and behavioural competence so that the participants would not feel offended.

Measures
- Modifies the content in relation to the client's needs and the participants' needs
- Reacts immediately according to the situation, based on the need analysis
- Varies approaches in order to achieve the client's goals

6.3.2. Apply a training cycle in planning and execution

Description

It is essential for the individual to know what the training cycle is, how it works and in which way it is to be used so that knowledge can be achieved by the best possible execution of training for the client. This translates to constantly gathering lessons learned and improves/corrects the individual's way of teaching to achieve optimal learning. The individual makes use of gathered information, (e.g. feedback from participants) to improve or correct training materials and course planning.

Measures
- Demonstrates that lessons learnt after the previous course have been implemented in the consecutive training course.
- Constantly improves training materials, the way of teaching and content

6.3.3. Provide relevant input to the participants, execute the training

Description

During the training, the individual must present the content in a way that is consistent with and in accordance with the participants' capabilities. On the basis of the needs analysis performed before the training, the individual must take care to adapt content and language complexity to the appropriate level and correct the plan when starting the training. It is essential to the success of a training session to adapt the degree of complexity to a participant's needs and experience.

The individual must draw relevant information from context analyses and assessment results before delivering the training. This needs to be processed with regard to the participants, the training goals of the client/audience and the training setting created by the client/organisation. Gathering as much information as possible as part of the preparation for a programme or session will help to reduce uncertainty. The more the individual knows, the better the preparation. In alignment with this information, the goals and the setting, the individual must preselect educational methods and tools which support achieving the training goals as well as fit the training setting (didactics and methodology).

Measures
- Provides simple examples which are relevant to the participants' context
- Draws from personal learning or experience when providing input
- Provides training in a way that is understandable and acceptable to participants
- Uses synonyms and paraphrases in order to achieve full understanding of the knowledge transfer

- Keeps expectations management in mind throughout the training process
- Pursues personal and individual goals

6.3.4. Handle uncertainty of the participants and client

Description
Providing training means to work with people – mainly adults – who need to acquire specific knowledge and skills for their job or professional development. The training is a means to fill a gap. This creates uncertainty because learning/training is a very personal experience. Dealing with one's own uncertainty is a sensitive topic which needs a trustworthy relationship and careful handling.

Uncertainty appears through all stages of a training process. At the beginning, aspects such as time engagement and individual training goals as well as future application are uncertain and need to be narrowed down (e.g. the client's named training goals may vary from each participant's personal educational goals). The setting of the planned training session may be uncertain due to reorganisation of rooms or workplace within the organisation. During the training sessions, uncertainty may arise for the participants when unfamiliar methods or approaches to the topic may be introduced. Learning always means to expand one's own comfort zones in terms of content, methods and people. Training can only offer a way of expanding skills and knowledge. The actual combination of old and new knowledge and skills lies in the participant's hands. Neither the individual nor the client can force the participant to learn and actively take part outside of their comfort zone.

After a training session, uncertainty is still present in terms of whether there will be an opportunity to continue the learning (lifelong learning) process of the participants.

Throughout the whole training process, from initiation to the final evaluation and closure of the training programme, the individual must be aware of uncertainty and must be willing to address/handle uncertainty appropriate to the client, the situation, and the degree of that uncertainty.

Measures
- Includes exercises for feedback (e.g. mood barometer, rating of personal training goals)
- Acts individually to underline trustworthiness
- Focuses attention on the training process to be aware of uncertainty from the early stage

6.3.5. Ensure that training setting matches the needs of the scheduled training format

Description

The place where the training takes place has a significant impact on the training's effectiveness. Location, the size of the training room, the number of people in the group, availability of additional space etc. should be matched to the objectives of the training. The individual has to rearrange the room during the training so that it is the most beneficial to achieving the training objectives. The individual must also negotiate the required training setting with the sponsor.

Measures

- Defines classroom needs with the organisation and sponsor
- Requests a classroom (location and space, on-site or off-site)
- Shows knowledge about the room and ensures necessary materials and equipment are laid out
- Takes time to prepare and clear the training room before the beginning, during breaks and after a training session, including the used materials (e.g. whiteboard, flipcharts)
- Adapts the classroom according to the change of circumstances (e.g. less peoples on the training, need to change the schedule)

6.4. Classroom engagement

Definition
Classroom engagement consists of managing the classroom setting as well as managing the interactions within the classroom or training room. It also includes managing different levels of competences on the part of the participants as well as the individual(s) (e.g. co-trainers). An experienced individual enables learning, raises motivation and participation. All of this triggers heightened classroom engagement.

Purpose
The purpose of this competence element is to provide the highest level of participant engagement during the training in order to achieve the training goals by using the right tools and methods.

Description
Achieving and maintaining a high level of engagement among participants is one of the main challenges that the individual faces. The individual should use different techniques and methods to sustain the highest possible level of interest in the knowledge being presented throughout the course. The main and most important factors that impact on this are accurate interpretation of the participants' individual goals and, as a practitioner, sharing problems associated with managing projects, programmes or portfolios.

Knowledge
- Motivation
- Adult learning processes
- Icebreaker methods
- Active listening
- Group dynamics

Skills
- Manages groups
- Builds trust and respect
- Reflects back on own emotions

Related competence elements
- Classroom logistics
- Content delivery
- Training design

6.4.1. Facilitate as 'master of ceremonies'

Description
Achieving a high level of engagement is largely based on bringing together different types of participants' personalities and character traits. Different personality types result in different expectations in the pace of training, the amount and form of the information provided and the principles of cooperation.

Explanation and adoption of clear rules of conduct during the training has a big impact on its subsequent implementation.

Measures
- Facilitates the group to agree on rules for training programme or training session (e.g. classroom rules); information is included in the training manual
- Creates and communicates rules for group work assignments (e.g. keeping to time, securing the results, establishing some form of summary such as photographic documentation of results)
- Keeps to established rules
- Raises interest of participants during training

6.4.2. Function as host to the training session and create a welcoming setting

Description
Before and after training, it is necessary to define and request classroom requirements with the organisation, back office or sponsor in order to guarantee a room setting which benefits the learning process. While ensuring that the training setting matches the needs of the training format, (e.g. whiteboard markers and sufficient numbers of chairs are available), the individual is responsible for creating a positive atmosphere for participants.

Measures
- Plans and double-checks the setting prior to the start of training
- Welcomes everyone personally
- Initiates agreed group rules

6.4.3. Work with group dynamics

Description
The use of active teaching methods encourages participants to talk to each other, get to know each other, feel some common experience and become aware of the differences between them. The individual's knowledge of the natural processes of team development allows a better understanding of the participants involved. It also supports the comprehension of the individual's task in the training because they are also subject to these processes. The individual has to show clearly their own actions do not cause all of the tensions or greatness in the group. If starting the group process, the individual has to understand it and support constructive methods of conflict resolution. Over time, participants more clearly see their dependence on others and the necessity to continuously refine the objectives and the principles governing mutual relationships.

Measures
- Manages group dynamics
- 'Reads' people and acts or responds accordingly
- Identifies the psychological types of participants

6.4.4. Manage interruptions

Description
Difficult and disruptive behaviour can affect other people's learning process. It can even go as far as threatening the execution of the whole course when it goes beyond the generally accepted (cultural, social) standards. The demotivating impact of one person's behaviour on the others hinders both the teaching and the active participation and learning of the group in the training. This threatens participants' ability to implement acquired knowledge in the future. The individual should make great efforts to overcome the impact of such behaviour.

Measures
- Applies methods of dealing with difficult participants
- Manages the different type of interrupters and interruptions
- Selects and applies timing and methods in order to deal with interruptions
- Evaluates the impact when interruptions are not being managed

6.4.5. Use humour as icebreakers and connects with the participants

Description
A characteristic feature of all training courses is a great diversity of teaching techniques that depend on the subject matter and potential participants. Selection of the right techniques influences the course, effectiveness and success of the whole training. The preferred solution is to use humorous elements, which also relaxes tension through laughter and encourages joint action. An effective way is to use an icebreaker activity. This helps to either familiarise the group with each other at the beginning of the training, or in introducing difficult subject matters. Cultural context should be considered while identifying icebreakers as humour is different among countries and even regions.

Measures
- Acknowledges behavioural patterns
- Uses proper methods of working with adults in terms of (emotionally) connecting with the participants
- Applies different kinds of icebreakers

6.4.6. Show own failures and mistakes in order to create a learning atmosphere

Description
Everyone makes mistakes, but not everyone wants to admit to them. The individual who shows their own mistakes as examples has a much better chance of gaining more involvement and confidence of the participants during the training process.

Measures
- Shares practical examples
- Estimates the impact when talking about own mistakes

6.5. Training evaluation

Definition

Evaluation is a systematic process. It involves researching information specific to the organisation and client's goals and needs. The purpose to find out whether the assumptions made at the beginning of a training programme or session have proved accurate after applying a certain method during the training process, using the criteria defined for a particular training process.

This involves monitoring the change caused by the training through the selection of appropriate strategies, research design and measures, as well as making recommendations to support decision making on the training. This also includes evaluation of training design/instructional design, (e.g. methods, tools, media, technology).

Purpose

The purpose of this competence element is to determine the effectiveness of interventions (which are the training session with its methods, tools and logistics). It is to enable the individual to use evaluation as useful tool throughout the training.

Description

Evaluation should take place after each stage of the training cycle, since only continuous monitoring provides visibility into the process and allows the individual to check that their own approach is correct. The aim of training is to develop participants for the benefit of the organisation and evaluation should take place at the end of each stage of the training cycle. At the end of the training, activities are used as part of the evaluation cycle to verify the effectiveness and efficiency. The evaluation should assess the training levels, the participants' reactions and level of knowledge they have acquired as well as newly acquired skills. It should also monitor how the knowledge and skills are applied after returning to the work environment and the efficient operation of the organisation as a whole.

Knowledge
- Benefits realisation management
- Improvement of training material according to the participants' needs, training needs
- Evaluation models and methods, (e.g. Kirkpatrick)

Skills
- Design of different kinds of evaluation survey
- Analysis of survey results
- Synthesis of survey conclusions
- Recommendations based on evaluation results
- Application of different evaluation methods (surveys)
- Application of appropriate evaluation methods (surveys)
- Applications of survey results in order to modify teaching methods and tools
- Monitoring skills such as making valid predictions especially relevant to maintain long-term business relationship with an organisation
- Compares the effects achieved with expectations

Related competence elements
- Client insight
- Demonstrate ethical, legal and individual standards

Key competence indicators

6.5.1. Choose evaluation methods geared toward the specific clients

Description
The individual adopts evaluation methods in agreement with the client. In order to make the right choice acceptable to the client and to the needs of the organisation, the individual should know the differences and similarities between evaluation methods and which fit best to a specific context and level of experience.

Measures
- Applies evaluation methods and rules of use
- Receives feedback about results of the training by using the adequate evaluation methods
- Chooses evaluation method according to own level of acquaintance with method and level of acquaintance on the client's side

6.5.2. Establish performance criteria for the success of the training process

Description
Assignments should create outcomes with which all concerned are in accord. In order to achieve this, it may be helpful to work with the client on agreed baselines and performance criteria, to which the assignment should relate. This

includes what is acceptable to the client and to the individual. All of this should be determined at the beginning of the assignment. It would be helpful to conduct an intermediate assessment of the assignment's progress that is accepted by all parties involved. The identified and agreed performance criteria can refer to quality as well as quantity. Another set of performance criteria can stem from indicators adopted in other areas of businesses and industry and from scientific results, as well as organisational baselines (e.g. from quality management, HR evaluation guidelines, etc.).

Measures
- Consults available performance criteria which are already established within the organisation and evaluates for usability for the training assignment
- Commits clients to established baseline for success
- Monitors own acceptance throughout the training assignment
- Organises a two-way assessment of criteria (participants' own perception, objective perception) in order to identify common denominators (especially relevant in larger organisations)
- Challenges existing performance indicators and thereby challenges the client/organisation to improve

6.5.3. Rate training, trainer and materials

Description
Rating the components (e.g. material, co-trainers, participants) of well-presented trainings is something the individual needs to do in order to create a personal baseline for their own standard of good training. Since training success is always made up of several aspects, the individual needs to be able to rate and rank those from superior to less helpful components. The individual needs to be able to differentiate co-trainers according to their area of expertise in order to make the right choice asking for support in difficult or industry-specific training settings.

Measures
- Creates an evaluation programme, including drafting of concept, and schedules updates of documentation
- Updates documentation according to schedule
- Discusses evaluation cycle with knowledgeable and experienced third parties
- Includes information in the training manual
- Provides further information based on the training manual

6.5.4. Provide feedback and information about results according to base configuration

Description
Measuring the effectiveness of training provides information about both the effects achieved and further development activities. The individual should evaluate the effects of the training and the training process in accordance with these principles. By properly conducting the evaluation process, the individual is able to provide constructive feedback to the client and participants and work with them to plan further development actions.

Measures
- Identifies the level of reaching the training objectives
- Uses evaluation methods, (e.g. minimal or max. methods, depending on what is necessary and wanted)
- Receives feedback about results of the training by using appropriate evaluation methods
- Communicates changes to the training programme to the client

Annex A:
Competence table

Trainer	Knowledge	Comprehension	Application	Analysis	Synthesis	Evaluation
SPECIFIC						
Perspective — Assignment design						
People — Guidance						
Practice — Consultancy methods						
Practice — Benefits evaluation						
Practice — Innovation						
COMMON						
Perspective — Professional networking						
Perspective — Client insight						
Perspective — Ethical, legal and professional standards						
People — Communication						
People — Uncertainty management						
People — Self-Improvement						
Practice — Change support						
Practice — Expectations management						
Practice — Outcomes						

Trainer	Knowledge	Comprehension	Application	Analysis	Synthesis	Evaluation
BASIS						
Perspective Strategy						
Governance, structures and processes						
Compliance, standards and regulations						
Power and interest						
Culture and values						
People Self-reflection and self-management						
Personal integrity and reliability						
Personal communication						
Relations and engagement						
Leadership						
Teamwork						
Conflict and crisis						
Resourcefulness						
Negotiation						
Results orientation						
Practice Design						
Goals, objectives and benefits						
Scope						
Time						
Organisation and information						
Quality						
Finance						
Resources						
Procurement and partnership						
Plan and control						
Risk and opportunities						
Stakeholders						
Change and transformation						
Select and balance						

	Coach	Knowledge	Comprehension	Application	Analysis	Synthesis	Evaluation
SPECIFIC							
Perspective	Coaching environment						
People	Facilitation						
Practice	Coaching models and interventions						
	Insights and learning						
	Coaching evaluation						
COMMON							
Perspective	Professional networking						
	Client insight						
	Ethical, legal and professional standards						
People	Communication						
	Uncertainty management						
	Self-Improvement						
Practice	Change support						
	Expectations management						
	Outcomes						

Coach	Knowledge	Comprehension	Application	Analysis	Synthesis	Evaluation
BASIS						
Perspective — Strategy						
Governance, structures and processes						
Compliance, standards and regulations						
Power and interest						
Culture and values						
People — Self-reflection and self-management						
Personal integrity and reliability						
Personal communication						
Relations and engagement						
Leadership						
Teamwork						
Conflict and crisis						
Resourcefulness						
Negotiation						
Results orientation						
Practice — Design						
Goals, objectives and benefits						
Scope						
Time						
Organisation and information						
Quality						
Finance						
Resources						
Procurement and partnership						
Plan and control						
Risk and opportunities						
Stakeholders						
Change and transformation						
Select and balance						

Consultant	Knowledge	Comprehension	Application	Analysis	Synthesis	Evaluation
SPECIFIC						
Perspective — Assignment design						
People — Guidance						
Practice — Consultancy methods						
Practice — Benefits evaluation						
Practice — Innovation						
COMMON						
Perspective — Professional networking						
Perspective — Client insight						
Perspective — Ethical, legal and professional standards						
People — Communication						
People — Uncertainty management						
People — Self-Improvement						
Practice — Change support						
Practice — Expectations management						
Practice — Outcomes						

Consultant	Knowledge	Comprehension	Application	Analysis	Synthesis	Evaluation
BASIS						
Perspective Strategy						
Governance, structures and processes						
Compliance, standards and regulations						
Power and interest						
Culture and values						
People Self-reflection and self-management						
Personal integrity and reliability						
Personal communication						
Relations and engagement						
Leadership						
Teamwork						
Conflict and crisis						
Resourcefulness						
Negotiation						
Results orientation						
Practice Design						
Goals, objectives and benefits						
Scope						
Time						
Organisation and information						
Quality						
Finance						
Resources						
Procurement and partnership						
Plan and control						
Risk and opportunities						
Stakeholders						
Change and transformation						
Select and balance						

Annex B: The common competence elements

3.4.4.	Choose and apply appropriate interview techniques	
3.4.5.	Deal with questions and misunderstandings	
3.4.6.	Choose the right channel to communicate with the client	
3.4.7.	Build and maintain a common ground with the client	
3.5.	**Uncertainty management**	**32**
3.5.1.	Maintain resilience during the assignment	
3.5.2	Demonstrate flexibility and adaptability to changing demands and deadlines	
3.5.3.	Identify and reflect on the causes of uncertainty	
3.5.4.	Identify and deploy methods to help the client to reduce uncertainty	
3.5.5.	Identify and deploy methods to help the client to transfer uncertainty	
3.5.6.	Identify and deploy methods to help the client to accept uncertainty	
3.5.7.	Share experiences and ideas as options for the client to consider	
3.6.	**Self-improvement**	**37**
3.6.1.	Update knowledge and expertise	
3.6.2.	Update individual skills, techniques and methods regularly	
3.6.3.	Proactively seek opportunities for further development	
3.6.4.	Learn from own and other assignments	
3.7.	**Change support**	**40**
3.7.1.	Identify the causes for change to build a reliable basis	
3.7.2.	Identify change requirements	
3.7.3.	Assess the client's ability to change	
3.7.4.	Develop a change design	
3.7.5.	Support the implementation of change	
3.7.6.	Integrate measures for recognising and dealing with resistance	
3.8.	**Expectations management**	**45**
3.8.1.	Establish goals, outcomes and benefits	
3.8.2.	Clarify interests and expectations of the people involved	
3.8.3.	Balance needs and expectations to optimise outcomes and success of the assignment	