

Mapping Your Technical Competencies Worksheet – Intermediate Accountant Example

Depth - Any **one** competency area; **all** ≥ Level 1; at least **two** at Level 2

What is your area of **Depth**?

- Financial Reporting
- Management Accounting
- Taxation
- Strategy & Governance
- Finance
- Audit & Assurance

What are your targeted areas of **Depth**?

- Level 1/Level 2: FR1 – Financial reporting needs & systems
- Level 1/Level 2: FR2 – Accounting policies and transactions
- Level 1/Level 2: FR3 – Financial Reporting preparation
- Level 1/Level 2: FR4 – Financial statement analysis

Where are my gaps?

- Level 1/Level 2: FR3 – Financial Reporting preparation
- Level 1/Level 2: _____
- Level 1/Level 2: _____
- Level 1/Level 2: _____

What are my strategies to fill those gaps?

- Strategy 1: Discuss with supervisor. Is there an opportunity for me to draft the year-end financial statements and note disclosures?
- Strategy 2: _____
- Strategy 3: _____
- Strategy 4: _____

Depth - What actionable steps can I take towards the strategies listed above?

Strategy 1	Actionable Steps	Date to Complete
	1. <u>Make notes of the current work that I am doing to prepare month end close statements. Brainstorm ideas for why it would benefit the organization to delegate this duty to me (ex. free up my supervisor's time to focus on other projects, cross training for coverage, etc.)</u>	Feb 25/22
	2. <u>Check supervisor's calendar to book 45 min meeting</u>	Feb 29/22
	3. <u>Send email to supervisor initiating meeting and attach notes made above so they can review in advance</u>	Mar 1/22
	4. <u>Lead meeting, clarify understanding, ask further questions and take notes</u>	Mar 9/22

Strategy 2	Actionable Steps	
	1. _____	_____
	2. _____	_____
	3. _____	_____
	4. _____	_____

Strategy 3	Actionable Steps	
	1. _____	_____
	2. _____	_____
	3. _____	_____
	4. _____	_____

Strategy 4	Actionable Steps	
	1. _____	_____
	2. _____	_____
	3. _____	_____
	4. _____	_____

Core - Financial Reporting and/or Management Accounting; at least **three** Level 1's or greater

What is/are your **Core** competency area(s)?

✓ Financial Reporting and/or ✓ Management Accounting

What are your targeted areas of **Core**?

Level 1/Level 2: FR3 – Financial Reporting preparation

Level 1/Level 2: FR4 – Financial statement analysis

Level 1/Level 2: MA2 – Planning, budgeting & forecasting

Where are my gaps?

Level 1/Level 2: MA2 – Planning, budgeting & forecasting

Level 1/Level 2: _____

Level 1/Level 2: _____

What are my strategies to fill those gaps?

Strategy 1: Request to cross train with team mate to perform more planning, budgeting & forecasting duties

Strategy 2: _____

Strategy 3: _____

Strategy 4: _____

Core - What actionable steps can I take towards the strategies listed above?

Strategy 1	Actionable Steps	Date to Complete
	1. <u>Send email to supervisor proposing the idea of cross training with team mate</u>	<u>Feb 16/22</u>
	2. <u>Pending approval, check team mate's calendar for 4 one-hour time slots</u>	<u>Feb 25/22</u>
	3. <u>Create a suggested training schedule for myself</u>	<u>Apr 2/22</u>
	4. <u>Once training is complete, request to start by covering team mate during their vacation time</u>	<u>Jun 1/22</u>

Strategy 2	Actionable Steps	
	1. _____	_____
	2. _____	_____
	3. _____	_____
	4. _____	_____

Strategy 3	Actionable Steps	
	1. _____	_____
	2. _____	_____
	3. _____	_____
	4. _____	_____

Strategy 4	Actionable Steps	
	1. _____	_____
	2. _____	_____
	3. _____	_____
	4. _____	_____

Breadth - Across *eight* sub-competencies; *all* ≥ Level 1; at least *four* at Level 2

What is your area of **Breadth**?

- Financial Reporting
- Management Accounting
- Taxation
- Strategy & Governance
- Finance
- Audit & Assurance

What are your targeted areas of **Breadth**?

- Level 1/Level 2: FN1 – Financial analysis & planning
- Level 1/Level 2: FN2 – Treasury management
- Level 1/Level 2: MA1 – Management Reporting Needs & Systems
- Level 1/Level 2: _____

Where are my gaps?

- Level 1/Level 2: MA1 – Management Reporting Needs & Systems
- Level 1/Level 2: _____
- Level 1/Level 2: _____
- Level 1/Level 2: _____

What are my strategies to fill those gaps?

- Strategy 1: Talk with supervisor to discuss my ideas/recommendations for improved internal reporting
- Strategy 2: _____
- Strategy 3: _____
- Strategy 4: _____

Breadth - What actionable steps can I take towards the strategies listed above?

Strategy 1	Actionable Steps	Date to Complete
	1. <u>Review my current job description to see how I could accommodate this new duty</u>	<u>Jun 11/22</u>
	2. <u>Pending approval, check supervisor's calendar to book one-hour meetings</u>	<u>Jun 18/22</u>
	3. <u>Send email to supervisor initiating meeting and attaching ideas to address gaps in management reporting</u>	<u>Jul 1/22</u>
	4. <u>During meeting, demonstrate eagerness for progression, willingness to learn new things, and confidence to handle the new challenge</u>	<u>Jul 11/22</u>

Strategy 2	Actionable Steps	
	1. _____	_____
	2. _____	_____
	3. _____	_____
	4. _____	_____

Strategy 3	Actionable Steps	
	1. _____	_____
	2. _____	_____
	3. _____	_____
	4. _____	_____

Strategy 4	Actionable Steps	
	1. _____	_____
	2. _____	_____
	3. _____	_____
	4. _____	_____