

Role Title: Financial Analyst

Job Details

Job Role Description

The Financial Analyst role involves providing financial analysis, forecasting, reporting, and strategic initiatives, supporting budgeting and planning processes, and overseeing financial details of projects and ventures.

Job Responsibilities

Job responsibility 1	Oversee financial data analysis
Job responsibility 2	Conduct financial forecasting and risk assessment
Job responsibility 3	Prepare financial reports for management review
Job responsibility 4	Analyze financial performance metrics

Job Skills and Recommended Proficiency Level

Technical Skills

Skills	Target Proficiency Level
Finance	3
Accounting	2
Financial Analysis	3
Financial Statements	3
Financial Modeling	3
Auditing	2
Economics	2
Investments	2
Project Management	2
Data Analysis	3

Common Skills

Skills	Target Proficiency Level
Management	2
Communication	2
Microsoft Excel	3
Forecasting	2
Operations	2
Leadership	2
Detail Oriented	3
Budgeting	2
Problem Solving	2
Planning	2

Technical Job Skills and Proficiency Levels

Skills Title			
Finance		Knowledge of financial analysis, forecasting, modeling, and planning; ability to assess financial data, and the ability to prepare accurate reports.	
Proficiency Levels			
Basic - 1	Intermediate - 2	Advanced - 3	World Class - 4
<p>Describes the basic concepts and terminology of finance.</p> <p>Identifies the major functions and responsibilities of the finance department.</p> <p>Cites examples of the use of financial analysis, forecasting, modeling, and planning.</p> <p>Names the major financial reports and their purpose.</p>	<p>Works with a specific financial function or activity.</p> <p>Assists in the preparation of financial reports.</p> <p>Uses basic financial analysis tools and techniques.</p> <p>Follows established financial analysis and reporting procedures.</p> <p>Participates in the preparation of financial forecasts.</p>	<p>Evaluates the financial implications of major business decisions.</p> <p>Advises others on the use of financial analysis tools and techniques.</p> <p>Monitors the organizations financial performance against the business plan.</p> <p>Designs and develops financial models for multiple and diverse business units.</p> <p>Trains others on the use of financial analysis tools and techniques.</p> <p>Oversees the preparation of financial reports.</p>	<p>Leads the development of financial strategies and financial planning processes.</p> <p>Designs and develops financial analysis, forecasting, modeling, and planning processes.</p> <p>Creates a system to monitor the financial performance of the organization.</p> <p>Develops financial analysis, forecasting, modeling, and planning best practices.</p> <p>Establishes financial analysis, forecasting, modeling, and planning standards.</p> <p>Monitors industry trends and directions in financial analysis, forecasting, modeling, and planning.</p>

Accounting	Knowledge of and ability to use various techniques and tools to analyze and report on financial status of the organization.		
Proficiency Levels			
Basic - 1	Intermediate - 2	Advanced - 3	World Class - 4
<p>Describes the basic accounting concepts and principles.</p> <p>Identifies the major types of financial statements and their purpose.</p> <p>Cites the major types of accounting reports and their purpose.</p> <p>Names the major accounting functions, features and capabilities.</p>	<p>Works with a specific accounting function or activity.</p> <p>Uses basic accounting tools and techniques.</p> <p>Assists in the preparation of financial reports.</p> <p>Follows established accounting practices and procedures.</p> <p>Participates in the analysis of financial data.</p>	<p>Evaluates the benefits and drawbacks of alternative accounting practices.</p> <p>Advises others on the use of accounting practices and principles.</p> <p>Monitors the organizations accounting practices to ensure compliance with GAAP.</p> <p>Trains others on the use of accounting practices and principles.</p> <p>Designs accounting practices for a specific organization or department.</p> <p>Oversees the organizations accounting practices.</p>	<p>Leads in the design and development of accounting practices and policies.</p> <p>Creates a system to monitor the organizations financial status.</p> <p>Develops accounting practices and policies for the organization.</p> <p>Designs accounting practices and policies for the organization.</p> <p>Establishes accounting practices and policies for the organization.</p> <p>Monitors the industry for accounting practices and policies.</p>

Financial Analysis		Knowledge of and ability to read, interpret and draw accurate conclusions from financial and numerical material.	
Proficiency Levels			
Basic - 1	Intermediate - 2	Advanced - 3	World Class - 4
Describes the purpose and use of common financial reports.	Works with basic financial analysis tools and techniques.	Evaluates the financial analysis process and results recommends improvements.	Leads in the development of financial analysis best practices.
Identifies the key financial reports used in the organization.	Assists in the preparation of financial analysis reports.	Advises others on the use of financial analysis in a variety of business situations.	Designs and develops financial analysis processes and procedures.
Cites examples of common financial analysis tools and techniques.	Uses basic financial analysis tools and techniques.	Trains others on the use of financial analysis in a variety of business situations.	Creates a system to monitor the accuracy of financial analysis.
Names key financial ratios and their significance.	Follows organizational practices and standards for financial analysis.	Designs and develops financial analysis reports for senior management.	Develops financial analysis training programs for others.
	Participates in the interpretation of financial analysis reports.	Monitors the organizations financial analysis practices and procedures.	Establishes organizational financial analysis standards.
		Oversees the financial analysis process to ensure that it is completed accurately and on time.	Monitors industry trends and developments in financial analysis.

Financial Statements	Knowledge of and ability to interpret and use the information provided in financial statements.		
Proficiency Levels			
Basic - 1	Intermediate - 2	Advanced - 3	World Class - 4
<p>Identifies the major types of financial statements.</p> <p>Describes the purpose and use of financial statements.</p> <p>Cites examples of financial statements.</p> <p>Explains the information contained in financial statements.</p>	<p>Works with a specific type of financial statement.</p> <p>Assists in the preparation of financial statements.</p> <p>Uses financial statements to analyze the financial health of an organization.</p> <p>Follows organizational guidelines and standards for financial statements.</p> <p>Explains the purpose and content of a specific financial statement.</p>	<p>Evaluates the financial condition of the organization based on financial statements.</p> <p>Advises others on the use of financial statements.</p> <p>Monitors the organizations financial performance based on financial statements.</p> <p>Trains others on the use of financial statements.</p> <p>Designs and develops financial statements for the organization.</p> <p>Oversees the preparation of financial statements.</p>	<p>Leads in the analysis of financial statements for the organization.</p> <p>Designs and develops financial statements for the organization.</p> <p>Creates a system to monitor the accuracy of financial statements.</p> <p>Develops organizational best practices for the use of financial statements.</p> <p>Establishes organizational standards for the use of financial statements.</p> <p>Predicts industry trends and developments in the use of financial statements.</p>

Financial Modeling	Knowledge of and ability to use various techniques to forecast business activity, analyze the profitability of business strategies, and to develop relevant financial information.		
Proficiency Levels			
Basic - 1	Intermediate - 2	Advanced - 3	World Class - 4
<p>Describes the purpose and use of financial modeling.</p> <p>Identifies the key components of a financial model.</p> <p>Cites examples of financial models used in own organization.</p> <p>Explains the basic concepts of financial modeling.</p>	<p>Works with a specific financial modeling tool.</p> <p>Participates in the development of financial models.</p> <p>Assists in the preparation of financial models.</p> <p>Uses financial modeling techniques to forecast business activity.</p> <p>Explains the key features and functions of a specific financial modeling tool.</p>	<p>Evaluates the benefits and drawbacks of alternative financial modeling techniques.</p> <p>Advises others on the use of financial modeling techniques to forecast business activity.</p> <p>Trains others on the use of financial modeling techniques to forecast business activity.</p> <p>Designs financial models to analyze the profitability of business strategies.</p> <p>Monitors the use of financial modeling techniques to forecast business activity.</p> <p>Oversees the development of financial models to analyze the profitability of business strategies.</p>	<p>Leads in the development of financial models for the organization.</p> <p>Designs and develops financial models for multiple and diverse business activities.</p> <p>Creates and implements best practices for financial modeling.</p> <p>Monitors industry and marketplace trends and developments in financial modeling.</p> <p>Develops organizational standards and policies for financial modeling.</p> <p>Champions the use of new financial modeling techniques and tools.</p>

Auditing		Knowledge of organization's internal audit processes, practices and methods; ability to analyze specific business processes and make recommendations on ways to improve them.	
Proficiency Levels			
Basic - 1	Intermediate - 2	Advanced - 3	World Class - 4
<p>Describes the purpose and scope of internal auditing.</p> <p>Identifies the types of audits performed by the internal audit function.</p> <p>Cites examples of common audit findings and recommendations.</p> <p>Describes the roles and responsibilities of the internal audit function.</p>	<p>Works with internal or external auditors to complete audits of specific business processes.</p> <p>Assists in the preparation of audit reports.</p> <p>Uses audit tools and techniques to analyze specific business processes.</p> <p>Follows established audit processes and practices.</p> <p>Explains the purpose and scope of a specific audit.</p>	<p>Evaluates the effectiveness of internal audit processes and practices.</p> <p>Advises others on the design of internal audit processes and practices.</p> <p>Trains others on the use of advanced tools and techniques for internal auditing.</p> <p>Designs internal audit processes and practices for the organization.</p> <p>Monitors the organizations internal audit processes and practices.</p> <p>Oversees the organizations internal audit processes and practices.</p>	<p>Leads in the design and development of internal audit processes and practices.</p> <p>Develops and implements internal audit practices and processes.</p> <p>Creates a monitoring system to ensure that internal audit practices are in compliance with the organizations policies.</p> <p>Establishes internal audit practices and processes.</p> <p>Monitors the industry for internal audit innovations and best practices.</p> <p>Designs internal audit practices and processes.</p>

Economics	Knowledge of and ability to use various economic theories to analyze and forecast economic trends and movements.		
Proficiency Levels			
Basic - 1	Intermediate - 2	Advanced - 3	World Class - 4
<p>Describes the basic concepts and terminology of economics.</p> <p>Identifies the major economic theories and their proponents.</p> <p>Cites examples of the application of economic theories to realworld situations.</p> <p>Explains the role of government in the economy.</p>	<p>Works with basic economic theories and models.</p> <p>Participates in economic analysis and forecasting projects.</p> <p>Assists in the development of economic analysis and forecasting reports.</p> <p>Uses economic theories to analyze and forecast economic trends and movements.</p> <p>Explains the relationship between economic indicators and economic activities.</p>	<p>Evaluates the impact of economic trends and movements on the organization.</p> <p>Advises others on the use of economic theories to analyze and forecast economic trends and movements.</p> <p>Monitors the organizations economic environment recommends appropriate actions.</p> <p>Trains others on the use of economic theories to analyze and forecast economic trends and movements.</p> <p>Designs economic models to analyze and forecast economic trends and movements.</p> <p>Oversees the organizations economic analysis and forecasting activities.</p>	<p>Leads in the development of economic theories and methodologies.</p> <p>Designs economic models to analyze and forecast economic trends and movements.</p> <p>Creates economic theories to explain the behavior of economic agents.</p> <p>Develops economic theories to explain the factors that determine the level of economic activity.</p> <p>Establishes economic theories to explain the factors that determine the level of economic activity.</p> <p>Monitors the development of economic theories and methodologies.</p>

Investments	Knowledge of the investment market and ability to identify and buy the type of investments that are best for the client.		
Proficiency Levels			
Basic - 1	Intermediate - 2	Advanced - 3	World Class - 4
<p>Describes the basic concepts of investments.</p> <p>Identifies the major types of investments.</p> <p>Explains the risks and rewards of various types of investments.</p> <p>Cites the key features of the major types of investments.</p>	<p>Assists in the development of investment strategies for clients.</p> <p>Works with a specific type of investment.</p> <p>Uses investment analysis tools to evaluate the risk and return of investments.</p> <p>Explains the key features of a specific type of investment.</p> <p>Participates in the investment selection process.</p>	<p>Evaluates the clients investment portfolio and recommends changes.</p> <p>Advises clients on the full range of investment alternatives.</p> <p>Monitors the clients investment portfolio and recommends changes.</p> <p>Designs and implements investment strategies for multiple clients.</p> <p>Trains others on the use of investment management tools and techniques.</p> <p>Oversees the investment management process for multiple clients.</p>	<p>Leads in the development of investment strategies for a variety of clients.</p> <p>Designs and implements investment programs for a variety of clients.</p> <p>Creates and implements investment policies and procedures.</p> <p>Develops and presents investment training programs for others.</p> <p>Monitors investment industry trends and directions assesses implications for the organization.</p> <p>Predicts the future of the investment market.</p>

Project Management		Knowledge of project management tools and techniques and ability to plan, organize, monitor, and control projects, ensuring efficient utilization of technical and administrative resources to achieve project objectives.	
Proficiency Levels			
Basic - 1	Intermediate - 2	Advanced - 3	World Class - 4
<p>Describes the roles and responsibilities of project team members.</p> <p>Identifies the phases and activities of the project management process.</p> <p>Explains the purpose and content of a project plan.</p> <p>Cites examples of project management tools and techniques.</p>	<p>Works with a project team to develop a project plan, including resource requirements, major milestones, and dependencies.</p> <p>Assists in monitoring project progress and ensuring that project plans and schedules are adhered to.</p> <p>Uses project management tools to track project progress, resource utilization, and financial expenditures.</p> <p>Participates in the development of project plans and schedules.</p> <p>Explains the purpose and content of project plans and schedules.</p>	<p>Evaluates the effectiveness of project management tools and techniques makes recommendations for improvements.</p> <p>Advises others on the use of project management tools and techniques.</p> <p>Designs and develops project management tools and techniques.</p> <p>Trains others on the use of project management tools and techniques.</p> <p>Monitors the use of project management tools and techniques.</p> <p>Oversees the use of project management tools and techniques.</p>	<p>Leads in the development of project management tools and techniques.</p> <p>Designs and develops project management tools and techniques.</p> <p>Creates a monitoring system to ensure that all projects are completed on time and within budget.</p> <p>Establishes best practices for the use of project management tools and techniques.</p> <p>Monitors industry trends and developments in project management tools and techniques.</p> <p>Develops training programs on the use of project management tools and techniques.</p>

Data Analysis	Knowledge of the investigation, evaluation, interpretation, and classification of data; the ability to identify, collect and analyze data to facilitate the development of financial strategies.		
Proficiency Levels			
Basic - 1	Intermediate - 2	Advanced - 3	World Class - 4
<p>Describes the basic concepts and terminology of data analysis.</p> <p>Identifies the types of data used in financial analysis.</p> <p>Explains the purpose of data analysis in financial management.</p> <p>Cites examples of data analysis tools and techniques.</p>	<p>Works with a specific type of data analysis.</p> <p>Assists in the development of data analysis reports.</p> <p>Uses data analysis tools and techniques to identify and interpret data.</p> <p>Participates in the data analysis process.</p> <p>Follows data analysis standards and policies.</p>	<p>Evaluates the quality of data analysis and recommends improvements.</p> <p>Advises others on the use of data analysis in financial strategies.</p> <p>Designs data analysis processes and procedures.</p> <p>Trains others on the use of data analysis in financial strategies.</p> <p>Monitors the use of data analysis in financial strategies.</p> <p>Oversees the use of data analysis in financial strategies.</p>	<p>Leads in the development of data analysis processes and best practices.</p> <p>Designs data analysis training programs for the organization.</p> <p>Creates a system to monitor the data analysis process and ensure the quality of the results.</p> <p>Develops data analysis standards and policies for the organization.</p> <p>Establishes data analysis processes and best practices for the organization.</p> <p>Monitors industry trends and developments in data analysis.</p>

Common Job Skills and Proficiency Levels

Management		Knowledge of and ability to use organizational strategies, practices and tools for administering and monitoring financial resources.	
Proficiency Levels			
Basic - 1	Intermediate - 2	Advanced - 3	World Class - 4
<p>Describes the roles and responsibilities of the finance function.</p> <p>Identifies the major financial management functions, activities and issues.</p> <p>Cites examples of financial management practices and tools.</p> <p>Explains the purpose and content of financial management reports.</p>	<p>Works with a specific aspect of financial management.</p> <p>Assists in the preparation of financial reports.</p> <p>Uses financial management tools and techniques.</p> <p>Follows financial management practices and procedures.</p> <p>Participates in the budgeting process.</p>	<p>Evaluates the effectiveness of financial management practices and tools.</p> <p>Advises others on the use of financial management practices and tools.</p> <p>Designs and develops financial management practices and tools.</p> <p>Trains others on the use of financial management practices and tools.</p> <p>Monitors the organizations financial management practices and tools.</p> <p>Oversees the use of financial management practices and tools.</p>	<p>Leads in the development of financial management strategies and practices.</p> <p>Designs and develops financial management tools and techniques.</p> <p>Creates a system to monitor the financial management practices of the organization.</p> <p>Develops financial management practices for the organization.</p> <p>Establishes organizational best practices for financial management.</p> <p>Predicts the future trends of financial management practices.</p>

Communication	Ability to effectively transmit, receive, and accurately interpret ideas, information, and needs through the application of appropriate communication behaviors.		
Proficiency Levels			
Basic - 1	Intermediate - 2	Advanced - 3	World Class - 4
<p>Describes the key elements of effective communication.</p> <p>Identifies the key elements of effective communication.</p> <p>Cites examples of effective and ineffective communication.</p> <p>Explains the importance of listening and feedback in the communication process.</p>	<p>Uses appropriate communication behaviors in a variety of different situations.</p> <p>Explains the importance of nonverbal communication.</p> <p>Participates in meetings and presentations.</p> <p>Assists in the preparation of written materials.</p> <p>Works with others to resolve communication problems.</p>	<p>Evaluates the effectiveness of communication in a variety of situations.</p> <p>Advises others on the use of different communication styles and techniques.</p> <p>Monitors the effectiveness of communication in a variety of situations.</p> <p>Develops and presents formal presentations to large and diverse groups.</p> <p>Designs and delivers effective written and oral communications.</p> <p>Trains others on the use of different communication styles and techniques.</p>	<p>Leads in the development of communication strategies for the organization.</p> <p>Designs and develops communication programs for diverse audiences.</p> <p>Creates a climate that encourages open communication.</p> <p>Establishes communication standards, policies, and practices.</p> <p>Monitors industry and marketplace trends and developments in communication.</p> <p>Develops and implements communication training programs.</p>

Microsoft Excel		Knowledge of and ability to use Microsoft Excel in the development and maintenance of financial models, analysis and reports.	
Proficiency Levels			
Basic - 1	Intermediate - 2	Advanced - 3	World Class - 4
<p>Describes the purpose and use of all major Excel functions, features and capabilities.</p> <p>Identifies the purpose and use of all major Excel components.</p> <p>Explains the use of the Excel Help function.</p> <p>Describes the differences between workbooks and worksheets.</p>	<p>Uses Excel to create and modify simple worksheets.</p> <p>Explains the purpose and use of all major functions, features and capabilities.</p> <p>Uses the help facility to learn new features and functions.</p> <p>Uses Excel to create and modify simple charts.</p> <p>Uses Excel to create and modify simple graphs.</p>	<p>Evaluates the benefits and drawbacks of alternative Excel design and development approaches.</p> <p>Advises others on the use of advanced Excel features and facilities.</p> <p>Designs and develops complex Excel workbooks.</p> <p>Trains others in the use of Excel features and facilities.</p> <p>Monitors Excel trends and assesses implications for inhouse production environment.</p> <p>Oversees the use of Excel in diverse environments and applications.</p>	<p>Leads in the design and development of complex financial models.</p> <p>Designs and builds interfaces to and from other applications.</p> <p>Monitors Microsoft Excel trends and assesses implications for inhouse production environment.</p> <p>Develops and presents a valid business case for upgrading to the latest release of Excel.</p> <p>Creates and maintains complex financial models.</p>

Forecasting		Knowledge of forecasting methods and ability to forecast future business conditions and make necessary adjustments to meet business targets.	
Proficiency Levels			
Basic - 1	Intermediate - 2	Advanced - 3	World Class - 4
<p>Describes the basic concepts of forecasting.</p> <p>Identifies the key factors that influence forecasting.</p> <p>Cites examples of forecasting methods and tools.</p> <p>Explains the purpose of forecasting in business.</p>	<p>Works with a specific forecasting method or technique.</p> <p>Participates in the forecasting process for a specific business area.</p> <p>Assists in the preparation of forecasts for a specific business area.</p> <p>Uses forecasting tools and techniques to predict future business conditions.</p> <p>Explains the rationale behind a specific forecast.</p>	<p>Evaluates the effectiveness of forecasting methods and tools makes recommendations for improvements.</p> <p>Advises others on the use of forecasting methods and tools.</p> <p>Designs and develops forecasting methods and tools.</p> <p>Trains others on the use of forecasting methods and tools.</p> <p>Monitors the organizations forecasting activities oversees the forecasting process.</p> <p>Oversees the organizations forecasting activities.</p>	<p>Leads the development of forecasting processes and policies.</p> <p>Designs forecasting systems and processes for the organization.</p> <p>Creates a system to monitor the accuracy of forecasts.</p> <p>Develops training programs on forecasting methods and techniques.</p> <p>Monitors industry for new forecasting methods and technologies.</p> <p>Establishes best practices for forecasting.</p>

Operations	Knowledge of major responsibilities, accountabilities, and organization of the operations function in the company; ability to accomplish operational tasks and maintain functioning of the operations.		
Proficiency Levels			
Basic - 1	Intermediate - 2	Advanced - 3	World Class - 4
<p>Describes the major responsibilities and activities of the operations function.</p> <p>Cites examples of operational tasks and activities.</p> <p>Identifies the key activities and deliverables of the operations function.</p> <p>Describes the roles and responsibilities of operations staff.</p>	<p>Works with the basic functions of the operations department.</p> <p>Assists in the implementation of operations functions.</p> <p>Uses the main tools and technologies for the operations function.</p> <p>Follows the company's operational policies and procedures.</p> <p>Participates in the development of the operations function.</p>	<p>Evaluates the effectiveness of operations and makes recommendations for improvements.</p> <p>Advises on the use of advanced technologies and tools for the operations function.</p> <p>Designs and implements operational processes and procedures.</p> <p>Trains others on the use of advanced technologies and tools for the operations function.</p> <p>Monitors the operations function to ensure compliance with organizational policies and procedures.</p> <p>Oversees the operations function to ensure the smooth running of operations.</p>	<p>Leads in the development of best practices for the operations function.</p> <p>Designs and develops the operations functions mission, vision, and objectives.</p> <p>Creates a system to monitor the effectiveness of the operations function.</p> <p>Develops a system to ensure that the operations function is in compliance with all relevant laws and regulations.</p> <p>Establishes the operations functions policies, strategies, and business plans.</p> <p>Leads in the design of the operations functions organizational structure.</p>

Leadership		Knowledge of, and ability to use strategies and skills to enlist others in setting, embracing and achieving objectives.	
Proficiency Levels			
Basic - 1	Intermediate - 2	Advanced - 3	World Class - 4
<p>Describes the concept of leadership.</p> <p>Identifies the key characteristics of a leader.</p> <p>Explains the difference between leadership and management.</p> <p>Cites examples of leadership in action.</p>	<p>Demonstrates leadership in a specific area or on a specific project.</p> <p>Explains the concept of leading from behind and gives examples of its use.</p> <p>Uses a variety of leadership styles and techniques.</p> <p>Participates in a leadership development program.</p>	<p>Evaluates the effectiveness of leadership styles and strategies in a variety of situations.</p> <p>Advises others on the use of leadership strategies and skills.</p> <p>Designs and implements leadership development programs.</p> <p>Monitors the effectiveness of leadership in a variety of situations.</p> <p>Trains others in the use of leadership strategies and skills.</p> <p>Oversees the use of leadership strategies and skills in a variety of situations.</p>	<p>Leads in the development of leadership skills and knowledge in others.</p> <p>Creates a climate that fosters leadership.</p> <p>Establishes a vision and direction for the organization.</p> <p>Demonstrates leadership in the face of crisis, change, and opportunity.</p> <p>Monitors and assesses the effectiveness of leadership in the organization.</p>

Detail Oriented	Knowledge of and ability to pay attention to the details of financial and numerical information and ability to recognize errors.		
Proficiency Levels			
Basic - 1	Intermediate - 2	Advanced - 3	World Class - 4
<p>Describes the importance of attention to detail in financial and numerical information.</p> <p>Explains the consequences of errors in financial and numerical information.</p> <p>Identifies the types of errors that can occur in financial and numerical information.</p> <p>Cites examples of financial and numerical information that is accurate and complete.</p>	<p>Works with financial and numerical information.</p> <p>Assists in the preparation of financial reports.</p> <p>Uses financial and numerical information to make decisions.</p> <p>Follows established procedures for checking financial and numerical information.</p> <p>Explains the importance of attention to detail in financial and numerical information.</p>	<p>Evaluates the accuracy of financial and numerical information.</p> <p>Advises others on how to pay attention to the details of financial and numerical information.</p> <p>Designs and implements financial and numerical information systems.</p> <p>Trains others on how to pay attention to the details of financial and numerical information.</p> <p>Monitors the accuracy of financial and numerical information.</p> <p>Oversees the accuracy of financial and numerical information.</p>	<p>Leads in the development of new methods and techniques for improving the accuracy of financial and numerical information.</p> <p>Designs and implements quality control systems to ensure the accuracy of financial and numerical information.</p> <p>Creates a work environment that encourages attention to detail.</p> <p>Develops training programs to improve the accuracy of financial and numerical information.</p> <p>Establishes best practices for the accuracy of financial and numerical information.</p> <p>Monitors industry trends and marketplace experiences with attention to detail.</p>

Budgeting		Knowledge of, and ability to use, strategies, practices and tools for managing the financial resources of the organization.	
Proficiency Levels			
Basic - 1	Intermediate - 2	Advanced - 3	World Class - 4
<p>Describes the purpose and use of a budget.</p> <p>Identifies the key components of a budget.</p> <p>Explains the concept of budgeting.</p> <p>Cites examples of budgeting practices in own area.</p>	<p>Works with a specific budget.</p> <p>Assists in the preparation of a budget.</p> <p>Follows established budgeting processes and procedures.</p> <p>Uses budgeting tools and techniques.</p> <p>Explains the purpose of a budget.</p>	<p>Evaluates the effectiveness of budgeting practices and tools recommends improvements.</p> <p>Advises others on the use of budgeting practices and tools.</p> <p>Trains others on the use of budgeting practices and tools.</p> <p>Oversees the development of the organizations budget.</p> <p>Monitors the organizations adherence to budgeting practices.</p> <p>Designs budgeting practices and tools for the organization.</p>	<p>Leads in the development of budgeting strategies and practices.</p> <p>Designs and develops budgeting processes and procedures.</p> <p>Creates a monitoring system to ensure that budgeting practices are in line with the organizations financial goals.</p> <p>Develops a theoretical background of budgeting and its application in the organization.</p> <p>Establishes best practices for budgeting within the organization.</p> <p>Monitors industry trends and developments in budgeting.</p>

Problem Solving		Knowledge of approaches, tools, techniques for recognizing, anticipating, and resolving organizational, operational or process problems; ability to apply this knowledge appropriately to diverse situations.	
Proficiency Levels			
Basic - 1	Intermediate - 2	Advanced - 3	World Class - 4
<p>Describes the basic concepts of problem solving.</p> <p>Identifies the key steps in the problem solving process.</p> <p>Explains the importance of defining a problem before attempting to solve it.</p> <p>Cites examples of problems that have been solved.</p>	<p>Works with others to identify and define problems.</p> <p>Assists in gathering information and determining cause of a problem.</p> <p>Uses appropriate problem solving and decision making processes.</p> <p>Follows up to ensure that problems are resolved.</p> <p>Participates in brainstorming, data gathering, and analysis activities to generate and select solutions.</p>	<p>Evaluates alternative solutions and assesses the impact of the selected solution.</p> <p>Advises others on how to apply problemsolving approaches and tools.</p> <p>Monitors the effectiveness of problemsolving efforts and the efficiency of problemsolving tools.</p> <p>Designs and develops approaches, tools, and techniques for solving organizational, operational or process problems.</p> <p>Trains others in the use of problemsolving tools and techniques.</p> <p>Oversees the resolution of complex or unusual problems.</p>	<p>Leads in the design of problem solving approaches, tools, and techniques.</p> <p>Establishes problem solving standards, policies, strategies, and best practices.</p> <p>Monitors industry and marketplace experiences with problem solving approaches and tools.</p> <p>Develops problem solving training programs for the organization.</p> <p>Creates problem solving case studies for the organization.</p> <p>Demonstrates a high level of proficiency in problem solving.</p>

Planning	Knowledge of effective planning techniques and ability to contribute to operational (short term), tactical (1-2 years) and strategic (3-5 years) planning in support of the overall business plan.		
Proficiency Levels			
Basic - 1	Intermediate - 2	Advanced - 3	World Class - 4
<p>Describes the organizations planning process, cycles and deliverables.</p> <p>Identifies the key planning activities and deliverables.</p> <p>Cites examples of planning documents and their content.</p> <p>Explains the purpose and use of a business plan.</p>	<p>Participates in the development of a basic plan.</p> <p>Assists in the identification of resources people, money, time, and other assets required to carry out the plan.</p> <p>Uses basic planning tools and techniques.</p> <p>Works with others to develop a plan.</p> <p>Explains the purpose of the plan to others.</p>	<p>Evaluates alternative scenarios and plans presents recommendations to senior management.</p> <p>Advises others on the planning process and the use of planning tools and techniques.</p> <p>Monitors the organizations planning processes recommends improvements.</p> <p>Designs and develops planning processes for new or unique situations.</p> <p>Trains others on the use of planning tools and techniques.</p> <p>Oversees the development of shortterm operational plans.</p>	<p>Leads the development of the organizations planning processes and practices.</p> <p>Designs and develops planning processes and practices for the organization.</p> <p>Creates a monitoring system to ensure that planning processes and practices are effective.</p> <p>Develops a theoretical understanding of planning processes and practices.</p> <p>Monitors industry trends and developments in planning processes and practices.</p> <p>Demonstrates indepth experience with planning processes and practices.</p>