

CGMA Competency Framework

People Skills

People Skills

Foundational: This requires a basic understanding of the business structures, operations and financial performance, and includes responsibility for implementing and achieving results through own actions rather than through others.

Intermediate: This requires a moderate understanding of overall business operations and measurements, including responsibility for monitoring the implementation of strategy. This has limited or informal responsibility for colleagues and/or needs to consider broader approaches or consequences.

Advanced: This requires a strong understanding of the organisation's environment, current strategic position and direction, with strong analytical skills and the ability to advise on strategic options for the business. This includes formal responsibility for colleagues and their actions, and that their decisions have a wider impact.

Expert: This requires expert knowledge to develop strategic vision and provide unique insight to the overall direction and success of the organisation. This has formal responsibility for business areas, and his/her actions and decisions have a high-level strategic impact.

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Influence

This is the process of establishing and managing both internal and external relationships to meet organisational objectives and governance responsibilities.

Foundational

- Adapt your personal style to suit different people and situations.
- Listen to and be sensitive to the views and values of others.
- Understand and relate to others from different cultural backgrounds, including peers and customers, in an open, friendly and professional way.

Intermediate

- Sell own ideas and agenda by linking them to the needs and goals of others.
- Anticipate responses of others when choosing the approach to take.
- Remain professional in difficult situations; demonstrate empathy to understand the feelings and actions of others; and give difficult messages in a way that limits misunderstanding and promotes acceptance.

Advanced

- Use a combination of logic, personal passion, conviction and interpersonal skills to influence others.
- Relate to, develop and make use of a wide network of key relationships from both inside and outside the organisation to influence others.
- Lobby to build behind-the-scenes support for ideas and plans and solicit the involvement of others to build ownership and buy-in.

Expert

- Influence and work effectively with organisations from different cultures.
- Negotiate effectively at senior levels through anticipating and managing objections and challenges.
- Communicate effectively and assertively in high-risk situations to resolve complex and/or sensitive issues and build consensus.

Negotiation and decision-making

This is the ability to use proper influencing skills to obtain positive outcomes and make decisions that align with the strategic direction of the organisation.

Foundational	Intermediate	Advanced	Expert
<ul style="list-style-type: none">• Recognise the different negotiating styles of parties to a negotiation and adapt style accordingly.• Support negotiations by providing information and being part of the team.• Understand who the key stakeholders are in a given situation and be able to communicate individual requirements.• Make decisions based on facts, common sense and previous experience; weigh up the pros and cons; and be able to explain the reasoning behind decisions.• Establish working-level relationships with third-party counterparts to resolve routine issues.	<ul style="list-style-type: none">• Understand stakeholders' positions and bargaining power and be able to negotiate and/or participate in negotiations with some support.• Manage buy-in and gain trust with internal stakeholders prior to and during negotiations.• Manage internal expectations and keep all parties informed of developments; ensure best negotiation practice in terms of preparation, approach, strategy, tactics and style.• Research and use data from a range of sources to make robust fact-based decisions; make available choices clear and simple to stakeholders.• Review the immediate results, broad implications and unintended consequences of a decision.	<ul style="list-style-type: none">• Negotiate in tough situations with both external and internal stakeholders; demonstrate confidence and good political savvy and maintain credibility with third-party key decision-makers.• Adjust personal positions and style quickly if circumstances change favourably or unfavourably; win concessions without damaging stakeholder relationships.• Manage the negotiation team effectively; ensure each member is fully prepared for the negotiation; consistently secure positive outcome from the negotiation.• Assess and lead fact-based decisions in high-risk situations; coach others accordingly; and take accountability for final decision outcomes.	<ul style="list-style-type: none">• Demonstrate use of a direct and diplomatic style; challenge information to detect discrepancies in reasoning.• Show an excellent sense of timing, and quickly gain trust and respect of all other parties to the negotiations.• Lead the most complex negotiations and demonstrate expert closing skills and excellent political and cultural savvy.• Lead fact-based decision-making for long-term strategic issues; analyse the wider business and political implications when making decisions, including the effectiveness of the outcome.• Share strategic insights and knowledge to help others make sound decisions.

Communication

This is the ability to translate and convey financial and non-financial information effectively to a variety of audiences using a range of mediums, including digital tools.

Foundational

- Listen actively to others, acknowledge hearing different perspectives and react appropriately to non-verbal cues.
- Develop and deliver verbal information in a clear and concise manner that is tailored to the needs of the audience.
- Develop written material that is clear, concise, accurate and grammatically correct; use appropriate language and tone and tailor the information to the needs of the audience.
- Provide fact-based information to others based on requests; use appropriate communication tools, including digital, to communicate effectively.
- Create and manage a digital identity.

Intermediate

- Understand the big picture by listening and leveraging non-verbal cues.
- Engage audience in interactive communication in small and large group settings, and anticipate needs/questions and respond appropriately.
- Select appropriate digital communications media in a given context.
- Create and manage multiple digital identities.
- Develop written material that is easily understood to influence business partners and management, and simplify complex information to ensure understanding.
- Identify the appropriate audience for sharing information and proactively share in a balanced and timely manner.

Advanced

- Effectively listen and pick up the total meaning of the message as well as information that others will typically miss.
- Deliver presentation to senior management with confidence and acknowledge when the answer to a business question is unknown.
- Share important fact-based information; simplify complex written communications and adapt style and content for all levels of the organisation.
- Encourage the sharing of ideas and best practices; encourage others to speak their minds and listen empathetically to understand the real motivators and emotions.
- Protect personal digital reputation.

Expert

- Lead organisation forums to obtain wide perspective of ideas.
- Create forums, systems and procedures to actively source, hear and share diverse perspectives to enhance understanding.
- Confidently present controversial and/or complex information to all levels of the organisation.
- Lead the development of written information for highly visible or complex situations.

Collaboration and partnering

This is the ability to establish relationships and cross-functional partnerships within and outside of the organisation using a range of collaborative tools to create value for the business.

Foundational

- Establish relationships and credibility with business partners.
- Analyse needs of business partners.
- Acknowledge different priorities between finance and the business partners.

Intermediate

- Maintain and enhance effective cross-functional business partnerships through demonstrated integrity.
- Influence outcomes and challenge appropriately using fact-based data.
- Identify and address additional business partner needs and educate them on value creation and accounting.
- Share data, information and digital content with others through appropriate technologies.

Advanced

- Lead cross-functional business initiatives and encourage team to cultivate relationships across the business.
- Drive collaborative culture and joint accountabilities across multiple stakeholders.
- Actively educate and challenge on limitations of possible solutions.
- Use digital tools and technologies for collaborative processes.
- Deal with data produced through several digital tools, environments and services.

Expert

- Drive cross-functional initiatives across the business that create value.
- Leverage a broader network across the business and externally.
- Evaluate digital tools and technologies for collaborative processes.
- Protect the organisation's digital reputation.