

# ClearCo Competency Directory

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## Introduction

We are excited to introduce the ClearCo Competency Framework Library – a comprehensive library to support how your organization defines, measures, and develops talent. The library features 217 competencies, each complete with behavioral indicators, structured interview questions, and targeted probing questions to support every stage of the talent lifecycle.

Coverage spans a wide range of professional domains, including soft skills, leadership, and deep industry-specific competencies across industries including Professional Services, Manufacturing, Health Care, Finance & Insurance, Construction, Retail Trade, Real Estate, Hospitality, Education, and Legal. An industry competency guide with recommended competencies has also been provided as a starting point.

Detailed mapping tables are provided to show how competencies from HRSG align to their ClearCo equivalents for both the Basic and Comprehensive editions. It also includes 59 additional competencies developed to address gaps and reflect the evolving demands of today's workforce.

The library is designed to fit the way your organization works. Competencies can be used as a direct replacement for your existing framework, or copied and edited to create customized versions tailored to your organization's unique needs. We are pleased to introduce the ClearCo Competency Framework Library, a comprehensive resource designed to help your organization define, measure, and develop talent effectively.

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# Competency Directory

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## Leadership & Management

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### **Accountability**

The willingness to accept responsibility for one's actions, decisions, and their outcomes, while maintaining transparency and following through on commitments to achieve organizational objectives.

### **Change Leadership**

The ability to influence, inspire, and guide individuals and teams through organizational transitions by articulating a vision and modeling new behaviors.

### **Change Management**

The ability to apply structured methodologies and tools to manage the people-side of change to achieve a required business outcome.

### **Decision Making**

The ability to choose the best course of action by analyzing information, evaluating risks, and considering the impact on organizational objectives.

### **Leadership**

The ability to inspire, guide, and develop individuals and teams to achieve organizational goals while modeling core values and fostering a culture of accountability.

### **People Management**

The ability to lead, develop, and motivate individuals and teams to achieve high performance while fostering a positive and inclusive work environment.

### **Performance Management**

The ability to oversee and develop employee work performance by setting clear expectations, providing continuous feedback, and aligning individual contributions with organizational objectives.

### **Program Management**

The ability to oversee multiple related projects and initiatives to achieve strategic goals, ensuring resource optimization and stakeholder alignment.

### **Resource Allocation**

The ability to strategically distribute financial, human, and material assets across the organization to maximize operational impact and achieve corporate goals.

### **Stakeholder Management**

The ability to identify, analyze, and manage individuals or groups who have an interest in or are impacted by organizational activities to ensure successful collaboration and goal achievement.

### **Strategic Decision Making**

The ability to evaluate complex information, weigh potential risks and rewards, and choose the course of action that best aligns with long-term organizational objectives.

### **Strategic Planning**

The ability to develop long-term goals and actionable plans to achieve an organization's mission and vision, while adapting to changing internal and external environments.

### **Team Leadership**

The ability to inspire, guide, and develop individuals and groups to achieve shared goals while fostering a culture of accountability and mutual respect.

### **Vision and Strategy Alignment**

The ability to translate organizational vision into actionable goals and ensure that all departmental activities and individual contributions are directly aligned with long-term strategic objectives.

## **Professional & Interpersonal Skills**

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### **Active Listening**

The ability to fully concentrate on, understand, and respond to verbal and non-verbal messages in a way that validates the speaker and clarifies meaning.

### **Adaptability**

The capacity to adjust effectively to changing circumstances, new challenges, and evolving priorities while maintaining performance and helping others navigate change successfully.

### **Attention to Detail**

The capacity to thoroughly review work for accuracy, identify errors and inconsistencies, and maintain high standards of precision while managing multiple tasks and competing priorities.

### **Calculated Risk Taking**

The ability to evaluate potential risks and benefits of a course of action, taking deliberate risks where the potential for positive outcomes outweighs the possibility of loss.

**Concern for Quality**

The ability to analyze work processes and outcomes to ensure they meet or exceed established standards of accuracy, completeness, and excellence.

**Conflict Resolution**

The ability to facilitate the discovery of solutions to disagreements or friction between individuals or groups by identifying root causes and fostering open communication.

**Continuous Learning**

The ability to proactively identify opportunities for professional growth and acquire new knowledge and skills to keep pace with changing industry demands.

**Creativity and Innovation**

The ability to generate original ideas, challenge the status quo, and develop novel solutions that add value to the organization and its customers.

**Critical Thinking**

The ability to objectively analyze facts, evaluate evidence, and use logical reasoning to form sound judgments and make informed decisions.

**Cross-Functional Collaboration**

The ability to work effectively with individuals and teams from different functional areas to achieve shared organizational goals and drive integrated solutions.

**Cultural Competence**

The ability to understand, appreciate, and interact effectively with people from diverse cultures, backgrounds, and perspectives to foster an inclusive and productive environment.

**Digital Literacy**

The ability to find, evaluate, and communicate information through various digital platforms and tools to enhance productivity and collaboration.

**Diversity and Inclusion**

The ability to foster a culture where differences in background, perspective, and identity are valued and leveraged to drive innovation and organizational success.

**Effective Communication**

The ability to convey information, ideas, and emotions clearly and persuasively across various formats while actively listening to ensure mutual understanding.

**Emotional Intelligence**

The ability to recognize, understand, and manage one's own emotions while influencing the emotions of others to build relationships and achieve goals.

**Ethical Judgment and Integrity**

The ability to make sound decisions based on moral principles, organizational values, and social responsibility while maintaining consistency between words and actions.

**Flexibility**

The ability to adapt quickly to new information, changing conditions, or unexpected obstacles while maintaining a positive and productive focus.

**Group Process Management and Moderation**

The ability to facilitate group interactions, manage meeting dynamics, and use moderation techniques to reach consensus, drive decisions, and maintain professional collaboration.

**Inclusive Practices**

The ability to design and implement workplace behaviors and systems that ensure all employees feel valued, heard, and empowered to contribute their unique perspectives.

**Influence and Persuasion**

The ability to convince others, gain buy-in for ideas, and shift perspectives by using logical arguments, emotional connection, and effective communication strategies.

**Information Gathering and Analysis**

The ability to identify, collect, and interpret data from diverse sources to provide actionable insights and support evidence-based decision-making.

**Initiative**

The ability to take proactive action, ownership of results, and identify opportunities for improvement without needing external direction.

**Negotiation**

The ability to engage with others to reach mutually beneficial agreements, resolve conflicts, and influence outcomes while maintaining positive professional relationships.

**Networking**

The ability to build and maintain a diverse range of professional contacts and relationships that provide access to information, expertise, and support.

**Organization and Planning**

The ability to set priorities, develop action plans, and allocate resources effectively to achieve goals within specified timelines.

**Organizational Savvy**

The ability to understand and navigate the formal and informal power structures, cultures, and dynamics within an organization to achieve objectives.

**Presentation Skills**

The ability to communicate information clearly and engagingly to an audience using appropriate tools and techniques to ensure message retention and impact.

**Problem Solving**

The ability to identify issues, analyze information, and implement effective solutions to overcome challenges and achieve organizational goals.

### **Professional Development**

The ability to proactively manage one's own career growth and skill acquisition while supporting others in their pursuit of excellence and expertise.

### **Professionalism**

The ability to maintain an appropriate standard of behavior, appearance, and ethics while representing the organization, fostering trust and accountability.

### **Resilience**

The ability to maintain high levels of performance and a positive attitude during periods of organizational change, high stress, or significant setbacks.

### **Self-Awareness**

The ability to recognize and understand one's own emotions, strengths, weaknesses, and motivations, and how they impact others in the workplace.

### **Self-Motivation**

The ability to sustain interest and effort toward long-term goals despite setbacks, and to take initiative without needing external direction.

### **Teamwork and Collaboration**

The ability to work effectively with others toward common goals, sharing information and resolving conflicts to maximize collective impact.

### **Time Management**

The ability to plan and exercise conscious control over the amount of time spent on specific activities to increase effectiveness, efficiency, and productivity.

## **Sales & Business Development**

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### **Account Management**

The ability to build, maintain, and grow strategic relationships with clients to maximize value, ensure satisfaction, and drive long-term business partnerships through proactive engagement and solution delivery.

### **Business Development**

The ability to identify new business opportunities, build strategic partnerships, and execute growth strategies to increase organizational value and market presence.

### **Client Engagement**

The ability to build and maintain strong, value-based relationships with clients to ensure high levels of satisfaction, trust, and mutual growth.

**Consultative Selling**

The ability to act as a trusted advisor to clients by understanding their unique business challenges and co-creating tailored solutions that drive measurable value.

**Customer Acquisition and Retention**

The ability to develop and execute strategies to attract new customers while building long-term relationships that increase loyalty and reduce churn.

**Customer Experience Management**

The ability to design, implement, and monitor customer-centric journeys that ensure satisfaction, foster emotional connection, and drive advocacy across all touchpoints.

**Customer Value Optimization**

The ability to analyze customer data to identify, deliver, and increase the total value a customer receives and provides over their entire lifecycle with the organization.

**Strategic Partnerships Management**

The ability to identify, establish, and cultivate mutually beneficial alliances with external organizations to achieve strategic objectives, drive innovation, and create shared value across organizational boundaries.

**Strategic Sales Planning**

The ability to develop and implement high-level sales strategies that align with organizational objectives, market trends, and customer needs to drive revenue growth.

**Territory Management**

The ability to strategically manage a geographic or vertical market area to optimize coverage, build client relationships, and achieve revenue targets.

## **Business Strategy & Analysis**

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**Business Acumen**

The understanding of how businesses operate and generate value, including the ability to interpret financial information, recognize market dynamics, and make decisions that drive organizational success.

**Business Analysis**

The ability to identify business needs, analyze requirements, and recommend solutions that deliver value by bridging the gap between stakeholders and technical teams through systematic investigation and documentation.

**Business Performance Analysis**

The ability to measure, evaluate, and interpret organizational performance data to identify trends, diagnose issues, and provide actionable insights that drive informed decision-making and continuous improvement.

**Event Management**

The ability to plan, organize, and execute professional events, conferences, and meetings that align with organizational goals and ensure a high-quality attendee experience.

**Industry Knowledge**

The ability to understand and stay current with market trends, competitor activities, and the regulatory environment to inform business decisions and maintain a competitive edge.

**Information Management**

The ability to organize, store, protect, and distribute organizational information to ensure its accessibility, reliability, and security throughout its lifecycle.

**Innovation Management**

The ability to establish and oversee the processes, tools, and culture required to systematically identify, develop, and implement new ideas that create organizational value.

**Pricing Strategy and Methods**

The ability to determine and implement optimal price points for products or services by analyzing market demand, competitor activity, and internal cost structures to maximize revenue and profitability.

**Product and Technical Knowledge**

The ability to understand and apply deep knowledge of an organization's products, services, and underlying technical systems to solve problems and drive value.

**Project Communications**

The ability to plan, manage, and execute effective communication flows between project teams, stakeholders, and organizational leadership to ensure transparency and project success.

**Project Execution**

The ability to oversee and complete project activities by managing resources, timelines, and technical requirements to ensure the delivery of intended business value.

**Project Financial Management**

The ability to plan, monitor, and control project budgets and expenses to ensure project objectives are met within financial constraints and deliver corporate value.

**Project Management**

The ability to lead and oversee projects from initiation to completion by managing resources, stakeholders, and constraints to deliver defined objectives.

### **Project Planning**

The ability to define project scopes, set objectives, and develop comprehensive plans that outline resources, timelines, and milestones.

### **Project Risk Management**

The ability to identify, assess, and mitigate potential project risks to ensure project objectives are met and organizational value is preserved.

### **Technical Product Expertise**

The ability to master complex product specifications and technical features to provide accurate solutions, troubleshooting, and strategic guidance to stakeholders.

## **Marketing & Communications**

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### **Brand Strategy and Positioning**

The ability to develop, articulate, and execute brand strategies that differentiate the organization, create meaningful connections with target audiences, and drive sustainable competitive advantage.

### **Content Marketing**

The ability to create, publish, and distribute valuable and relevant content to attract, engage, and retain a clearly defined audience while driving profitable customer action.

### **Digital Marketing and Social Media**

The ability to leverage digital channels, platforms, and social technologies to reach target audiences, build brand awareness, and drive measurable customer engagement.

### **Integrated Marketing Communications**

The ability to align and unify all marketing tools, functions, and platforms into a seamless program that maximizes impact on the target audience and ensures global brand consistency.

### **Market Research and Analysis**

The ability to systematically gather and interpret data about customers, competitors, and market conditions to identify opportunities and inform organizational strategy.

### **Marketing Communications Management**

The ability to oversee the creation and distribution of brand messages across diverse platforms, ensuring consistent organizational voice and effective audience engagement.

### **Marketing Performance Measurement**

The ability to track, analyze, and report on the effectiveness of marketing activities using data-driven insights to optimize spend and achieve business objectives.

### **Marketing Planning**

The ability to develop comprehensive marketing strategies and action plans that align with organizational goals, target audience needs, and market conditions.

### **Media and Public Relations**

The ability to manage the organization's reputation and relationship with the public, media, and key stakeholders through strategic communication and storytelling.

### **Omnichannel Marketing**

The ability to integrate multiple marketing channels into a single, cohesive customer experience that ensures brand consistency and maximizes engagement across all touchpoints.

### **Strategic Marketing**

The ability to develop and execute long-term marketing plans that differentiate the brand, reach target audiences effectively, and achieve sustainable competitive advantage.

## **Finance & Accounting**

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### **Accounting and Financial Systems Management**

The capability to select, implement, maintain, and optimize financial and accounting systems to ensure accurate financial data, efficient processes, and regulatory compliance across the organization.

### **Accounts Payable and Receivable Management**

The ability to manage the full cycle of incoming and outgoing payments, ensuring timely collections, accurate disbursements, proper documentation, and optimal cash flow management while maintaining vendor and customer relationships.

### **Audit Management**

The ability to plan, execute, and oversee audit activities to assess organizational controls, ensure compliance, identify risks, and provide valuable recommendations for improvement.

### **Capital Markets**

The ability to understand and navigate the systems, institutions, and mechanisms that facilitate the trade of financial securities, including the analysis of market trends, risks, and regulatory requirements.

**Cash Flow Management**

The ability to monitor, analyze, and optimize the timing of cash inflows and outflows to ensure organizational liquidity and financial health.

**Commercial Lending**

The ability to evaluate, structure, and manage business loans and credit facilities while assessing risk and ensuring compliance with financial regulations.

**Cost Accounting**

The ability to record, classify, and analyze business expenditures to determine the exact cost of products or services, enabling informed pricing and budgeting decisions.

**Credit Management**

The ability to assess the creditworthiness of customers, establish appropriate credit limits, and implement effective collection strategies to maximize revenue and minimize bad debt.

**Credit Risk Assessment**

The ability to evaluate the creditworthiness of potential borrowers and assess the financial risk of lending or credit activities to ensure organizational stability and regulatory compliance.

**Debt Management**

The ability to manage and monitor an organization's debt obligations, ensuring liquidity, interest rate optimization, and compliance with lending agreements.

**Deposit and Account Services Management**

The ability to manage and optimize bank account lifecycle services, ensuring accuracy, regulatory compliance, and operational excellence for retail or commercial customers.

**External Regulatory Reporting**

The ability to prepare, validate, and submit financial and operational data to government and industry regulatory bodies, ensuring full compliance with legal disclosure requirements.

**Financial Acumen**

The ability to understand and apply financial principles, data, and tools to drive business decisions, improve profitability, and ensure long-term financial sustainability.

**Financial Analysis Application**

The ability to use quantitative techniques and financial data to evaluate business performance, identify growth opportunities, and provide actionable insights for strategic planning.

**Financial Budget Management**

The ability to plan, allocate, and monitor financial resources to achieve departmental and organizational goals while ensuring fiscal responsibility and efficiency.

**Financial Policy and Standards Development**

The ability to define, document, and implement financial rules, practices, and guidelines that ensure organizational consistency, accountability, and ethical behavior.

**Financial Reconciliation**

The ability to compare and match financial records from different sources to ensure accuracy, resolve discrepancies, and maintain the integrity of financial data.

**Financial Reporting and Analysis**

The ability to prepare accurate financial statements and interpret data to provide insights into organizational performance and financial health.

**Financial Risk Management**

The ability to identify, assess, and mitigate financial risks, including credit, market, and liquidity risks, to protect organizational assets and ensure stability.

**Fixed Asset Accounting**

The ability to record and manage the lifecycle of tangible assets, including acquisition, depreciation, impairment, and disposal, ensuring compliance with accounting standards.

**Fraud Detection and Prevention**

The ability to implement controls, monitor transactions, and conduct investigations to identify and stop fraudulent activities within an organization.

**Internal Controls Assessment**

The ability to evaluate and improve the effectiveness of risk management, control, and governance processes within an organization to ensure operational efficiency and financial integrity.

**Loan Origination and Processing**

The ability to manage the end-to-end lifecycle of loan applications, from initial intake and documentation gathering to final verification and closing coordination, ensuring regulatory compliance and data integrity.

**Mergers and Acquisitions**

The ability to identify, evaluate, and execute organizational combinations or asset purchases, ensuring successful integration and the realization of strategic synergies.

**Revenue Cycle Management**

The ability to manage and optimize the organizational payment flow, from client intake to final payment, ensuring accuracy, compliance, and consistent cash flow.

**Shareholder Value Management**

The ability to manage corporate actions and financial decisions to maximize the wealth of shareholders while balancing long-term sustainability and ethical governance.

# Human Resources

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## **Compensation and Benefits Administration**

The ability to design, implement, and manage employee reward programs, including salary structures, insurance, and retirement plans, ensuring market competitiveness and regulatory compliance.

## **Competency Framework Development**

The ability to identify, define, and document the knowledge, skills, and behaviors required for success in specific roles or across an entire organization.

## **Employee Engagement**

The ability to create an environment that motivates, inspires, and retains employees by aligning their personal purpose with the organization's goals.

## **Employee Relations**

The ability to manage and maintain positive relationships between the organization and its employees by resolving conflicts, addressing grievances, and fostering a productive work environment.

## **Employment Law and Compliance**

The ability to understand, apply, and ensure adherence to local and international labor laws, regulations, and organizational policies to protect both the firm and its employees.

## **HR Management**

The ability to manage the employee lifecycle, from recruitment and onboarding to performance management and offboarding, while ensuring alignment with organizational goals.

## **HR Strategic Planning**

The ability to develop and implement human capital strategies that directly support long-term business objectives, ensuring a high-performing and agile workforce.

## **Learning Culture Development**

The ability to foster an environment that values continuous curiosity, knowledge sharing, and professional growth, ensuring that learning is embedded into the daily workflow.

## **Occupational Health Programs**

The ability to design and manage workplace health initiatives that prevent work-related injuries and illnesses while promoting the overall physical and mental well-being of employees.

## **Organizational Development**

The ability to assess organizational needs and implement interventions that improve group performance, culture, and long-term health.

### **Payroll Administration**

The ability to manage and process organizational payroll systems accurately, ensuring compliance with tax laws, labor regulations, and internal policies.

### **Recruitment and Selection**

The ability to identify, attract, and evaluate potential talent to ensure the organization has the necessary human capital to achieve its business objectives.

### **Talent Development**

The ability to identify, cultivate, and mentor individuals to enhance their skills, performance, and long-term career growth within the organization.

### **Talent Strategy**

The ability to align workforce planning and human capital acquisition with long-term organizational goals to ensure competitive advantage and future readiness.

### **Training Delivery**

The ability to facilitate educational programs and learning sessions using diverse instructional methods to optimize learner outcomes and improve professional performance.

### **Workforce Planning**

The ability to analyze the organization's current workforce and determine the future human capital requirements needed to achieve business objectives and close skill gaps.

## **Technology & Information Systems**

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### **Data Visualization and Reporting**

The ability to transform complex datasets into clear, visual representations and generate actionable reports that support organizational decision-making.

### **Database Architecture and Design**

The ability to design, implement, and optimize complex database structures to ensure high availability, data integrity, and performance in alignment with business requirements.

### **Database Management**

The ability to design, implement, and maintain data storage systems that ensure data integrity, security, and accessibility for organizational needs.

### **Enterprise and Solution Architecture**

The ability to design, align, and implement IT systems and infrastructure that directly support business objectives, ensuring scalability, security, and technological coherence.

**Incident Detection and Response**

The ability to identify, analyze, and contain security threats or operational disruptions while implementing recovery procedures to minimize organizational impact.

**Information Management**

The ability to organize, store, protect, and distribute organizational information to ensure its accessibility, reliability, and security throughout its lifecycle.

**IT Help Desk and User Support**

The ability to provide technical assistance and support to end-users, resolving hardware and software issues to ensure minimal disruption to business operations.

**IT Infrastructure Management**

The ability to design, deploy, and maintain the hardware, software, and networking components that form the foundation of an organization's IT environment.

**IT Project Management**

The ability to plan, execute, and close information technology projects by managing resources, timelines, and technical risks to deliver business value.

**IT Service Management**

The ability to manage and improve the delivery of IT services to meet business needs, ensuring quality, reliability, and alignment with industry frameworks like ITIL.

**IT Vendor and Asset Management**

The ability to manage the lifecycle of IT assets and maintain strategic relationships with technology vendors to optimize costs and ensure service quality.

**Network Configuration and Troubleshooting**

The ability to set up, maintain, and repair network hardware and software components to ensure optimal connectivity and security.

**Network Security Management**

The ability to design, implement, and monitor secure network architectures to protect data integrity and availability against unauthorized access or technical failures.

**Security Operations and Monitoring**

The ability to monitor, detect, and respond to security threats and incidents to protect organizational assets, data, and information systems from unauthorized access or harm.

**Software Development and Programming**

The ability to design, code, test, and maintain software applications using various programming languages and development methodologies.

**System Design**

The ability to define the architecture, modules, interfaces, and data for a system to satisfy specified requirements while ensuring scalability, reliability, and security.

### **Systems Administration**

The ability to install, configure, and maintain organizational computer systems and servers to ensure optimal performance, security, and user access.

### **Systems Integration**

The ability to combine disparate computing systems and software applications physically or functionally to act as a coordinated whole.

### **Technology Proficiency**

The ability to effectively use organizational software, hardware, and digital tools to enhance productivity, streamline workflows, and support business goals.

## **Operations & Supply Chain**

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### **Asset Management**

The ability to strategically acquire, deploy, maintain, and dispose of organizational assets to maximize value, minimize costs, and ensure optimal utilization throughout the asset lifecycle.

### **Business Process Management**

The ability to design, document, execute, and monitor business processes to ensure efficient operations, consistent outcomes, and alignment with organizational objectives through systematic governance and continuous refinement.

### **Business Processes Improvement**

The ability to analyze existing workflows, identify inefficiencies, and implement enhancements that increase productivity, reduce costs, and improve quality through systematic problem-solving and change implementation.

### **Demand Planning and Forecasting**

The ability to predict future customer demand by analyzing historical data, market trends, and business drivers to optimize inventory and supply chain efficiency.

### **Equipment Operation and Maintenance**

The ability to safely operate technical equipment and perform routine maintenance or repairs to ensure operational uptime and longevity of assets.

### **Global Supply Chain Management**

The ability to oversee and optimize the flow of goods, services, and information across international borders, balancing cost, speed, and sustainability.

**Inventory and Cost Control**

The ability to manage and optimize institutional resources, including stock procurement, valuation, and distribution, to ensure financial efficiency and operational continuity.

**Inventory and Materials Management**

The ability to oversee the complete lifecycle of physical goods and raw materials, including sourcing, storage, and distribution, to minimize costs and ensure production continuity.

**Logistics and Transportation Management**

The ability to oversee and optimize the movement of goods, balancing speed, cost, and safety while ensuring full visibility across the entire distribution network.

**Procurement Operations**

The ability to manage and optimize the end-to-end purchasing process, from requisition to payment, while ensuring supplier quality, cost efficiency, and regulatory compliance.

**Quality Control and Testing**

The ability to oversee and implement systematic evaluation processes for physical or digital products, ensuring that all outputs meet internal specifications and external quality standards.

**Quality Management**

The ability to establish and maintain standards, processes, and tools that ensure organizational outputs consistently meet or exceed established requirements and stakeholder expectations.

**Sourcing Operations**

The ability to identify, evaluate, and engage suppliers to ensure the continuous supply of high-quality goods and services at optimal costs.

**Strategic Sourcing**

The ability to analyze organizational spend and develop supply strategies that maximize value and minimize risk over the long term.

**Supplier Relationship Management**

The ability to manage and develop relationships with suppliers to ensure the continuous supply of high-quality goods and services while maximizing value and innovation.

**Vendor Management**

The ability to oversee relationships with external providers, ensuring that all third-party services and products meet organizational standards for quality, cost, and risk compliance.

**Vendor Relationship Management**

The ability to establish, manage, and optimize strategic partnerships with external suppliers to ensure quality, cost-efficiency, and alignment with organizational goals.

### **Warehouse and Distribution Management**

The ability to oversee and optimize the day-to-day operations of logistics centers, ensuring efficient storage, inventory accuracy, and timely distribution of goods.

### **Workplace Safety Management**

The ability to establish and oversee the systems, policies, and practices that protect employees from workplace hazards and ensure compliance with occupational health and safety regulations.

## **Legal & Compliance**

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### **Case and Matter Management**

The ability to oversee specific administrative, legal, or clinical matters from intake to resolution while ensuring compliance and data integrity.

### **Contract Administration**

The ability to manage, monitor, and execute the terms and conditions of contracts throughout their lifecycle to ensure operational compliance and minimize organizational risk.

### **Contract Negotiation**

The ability to reach mutually beneficial agreements with internal and external parties by effectively communicating interests, managing trade-offs, and protecting organizational value.

### **Corporate and Regulatory Compliance**

The ability to ensure that the organization and its employees adhere to all relevant laws, regulations, and internal policies to prevent legal and reputational risk.

### **Corporate Governance**

The ability to understand and apply the systems of rules, practices, and processes by which an organization is directed and controlled, ensuring accountability and transparency.

### **Corporate Social Responsibility**

The ability to integrate social, environmental, and ethical concerns into business operations and strategy to create long-term value for stakeholders and society.

### **Discovery and Litigation Support**

The ability to manage the systematic gathering, organization, and validation of evidence to support legal proceedings and ensure organizational compliance with litigation requirements.

### **Insurance Regulatory Compliance**

The ability to ensure that insurance products and operations adhere to all applicable laws, financial regulations, and industry standards to protect consumers and mitigate legal risk.

### **Legal Research and Writing**

The ability to manage the systematic gathering, organization, and validation of legal authorities to support case proceedings and ensure organizational compliance with litigation requirements.

### **Loss Control and Prevention**

The ability to identify potential sources of risk and implement proactive measures to minimize financial, physical, or reputational loss within an organization.

### **Policy and Standards Development**

The ability to research, develop, and monitor organizational standards to ensure that an institution adheres to all applicable legal, regulatory, and technical benchmarks.

### **Regulatory Compliance**

The ability to ensure that the organization and its employees adhere to all relevant laws, regulations, and internal policies to prevent legal and reputational risk.

## **Industry-Specific: Healthcare**

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### **Clinical Documentation**

The ability to accurately and comprehensively record patient healthcare information and clinical interventions to ensure continuity of care, legal compliance, and accurate billing.

### **Clinical Operations Management**

The ability to oversee the daily operations of clinical environments, including resource allocation, staffing, and workflow optimization, to ensure the delivery of high-quality patient care.

### **Health Information Systems Management**

The ability to manage and optimize healthcare technology systems to ensure high-quality patient data sharing, security, and interoperability across the medical ecosystem.

### **Healthcare Quality Improvement**

The ability to manage and implement systematic processes to evaluate clinical performance and lead initiatives that enhance patient outcomes, safety, and operational standards.

### **Healthcare Regulatory Compliance**

The ability to ensure that healthcare services and operations adhere to all applicable laws, medical regulations, and quality standards to protect patient safety and mitigate legal risk.

### **Infection Prevention and Control**

The ability to implement and oversee evidence-based practices to prevent the transmission of infectious agents in clinical environments while ensuring compliance with healthcare safety standards.

### **Laboratory Operations Management**

The ability to oversee and optimize the day-to-day production and service functions of a laboratory, ensuring high-quality outputs and regulatory compliance.

### **Laboratory Safety and Compliance**

The ability to implement and oversee systematic preventive approaches to laboratory safety from biological, chemical, and physical hazards in testing environments.

### **Medication Administration and Safety**

The ability to accurately prepare, administer, and document medications for patients while ensuring adherence to safety protocols and regulatory standards to prevent medical errors.

### **Patient and Family Education**

The ability to fully explain, validate, and clarify clinical instructions to patients and their families in a way that ensures understanding and compliance.

### **Patient Assessment and Care Planning**

The ability to systematically evaluate patient health and develops personalized care plans while ensuring compliance with data integrity standards and clinical requirements.

## **Industry-Specific: Education**

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### **Academic Program Administration**

The ability to oversee the design, implementation, and maintenance of educational programs, ensuring academic rigor, faculty coordination, and efficient student service delivery.

### **Accreditation and Assessment Management**

The ability to manage the systematic evaluation of institutional quality against external benchmarks and oversee the documentation required for formal accreditation.

### **Education Policy and Compliance**

The ability to research, develop, and monitor educational policies to ensure that an institution adheres to all applicable legal, regulatory, and accreditation standards.

### **Faculty and Staff Supervision**

The ability to lead and develop academic and administrative personnel to achieve departmental goals while fostering a culture of excellence and accountability.

### **Instructional Design**

The ability to design, develop, and implement educational programs and materials that optimize learning outcomes and improve professional performance.

### **Research Documentation and Record Keeping**

The ability to manage the systematic gathering, organization, and validation of research data to ensure institutional transparency and compliance with academic or industry standards.

### **Research Project Design**

The ability to develop and oversee the methodology, resource allocation, and timelines for academic or industrial research initiatives to ensure objective findings.

### **School Operations Management**

The ability to oversee the daily non-academic functions of an educational institution, including facility logistics, resource allocation, and safety protocols, to support a productive learning environment.

### **Scientific Data Analysis and Interpretation**

The ability to manage and optimize the evaluation of complex scientific datasets to ensure high-quality findings and actionable conclusions within the research ecosystem.

### **Student Services Management**

The ability to oversee the design, implementation, and maintenance of support programs for students, ensuring efficient service delivery and positive educational outcomes.

### **Technical and Scientific Writing**

The ability to communicate complex technical or scientific information clearly and accurately to specific audiences through formal documentation, ensuring compliance with standards and ensuring intended impact.

## **Industry-Specific: Financial Services**

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### **Claims Investigation and Adjudication**

The ability to thoroughly investigate claims, evaluate evidence against policy guidelines, and make formal determinations to ensure accurate and compliant resolution.

### **Insurance Underwriting and Risk Selection**

The ability to evaluate insurance applications against actuarial data and policy guidelines to determine coverage eligibility, pricing, and organizational risk exposure.

### **Policy Servicing and Administration**

The ability to manage and optimize insurance policy lifecycle services, ensuring accuracy, regulatory compliance, and operational excellence for retail or commercial customers.

## **Industry-Specific: Hospitality & Retail**

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### **Food and Beverage Operations**

The ability to oversee and optimize the day-to-day production and service functions of a food establishment, ensuring high-quality outputs and customer satisfaction.

### **Food Safety and HACCP Compliance**

The ability to manage and implement systematic preventive approaches to food safety from biological, chemical, and physical hazards in production processes.

### **Front Office Operations**

The ability to manage guest reception, registration, and room assignments while ensuring high service quality and operational efficiency in a hospitality setting.

### **Front-of-House Service Management**

The ability to oversee the dining or service areas of a hospitality establishment, ensuring seamless coordination between staff and guest expectations.

### **Guest Experience Management**

The ability to design and manage the end-to-end journey of guests to ensure high engagement, loyalty, and brand consistency across all touchpoints.

### **Housekeeping and Facilities Management**

The ability to oversee the maintenance, cleanliness, and physical upkeep of buildings and infrastructure to ensure a safe, functional, and professional environment.

### **Kitchen Production Management**

The ability to oversee and optimize the day-to-day production and timing of a commercial kitchen, ensuring high-quality food preparation and staff coordination.

### **Menu Engineering and Pricing**

The ability to analyze menu item popularity and profitability to design strategically optimized offerings and implement pricing models that maximize revenue and brand value.

### **Merchandise Management**

The ability to plan, source, and manage a product portfolio to meet customer demand while optimizing inventory levels, margins, and sales growth.

### **Retail Store Operations**

The ability to oversee and optimize the day-to-day functions of a retail establishment, ensuring customer satisfaction, staff productivity, and financial profitability.

## **Industry-Specific: Manufacturing**

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### **Lean Manufacturing and Continuous Improvement**

The ability to manage and implement systematic processes to evaluate industrial performance and lead initiatives that enhance production outcomes, safety, and operational standards.

### **Manufacturing Quality Control**

The ability to oversee and implement systematic evaluation processes for manufactured goods, ensuring that all products meet internal specifications and external quality standards.

### **Product Design and Development**

The ability to conceptualize, design, and create new products or enhance existing ones to meet market needs and organizational goals.

### **Prototype Development and Testing**

The ability to design, build, and evaluate initial models of products or systems to validate concepts and refine functionality before full-scale production.

# Industry Competency Guide

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The following section provides recommended competencies for ten key industries. These recommendations are designed to help organizations quickly identify the most relevant competencies for their workforce. Each industry includes a curated set of competencies along with a brief rationale for why each is critical in that context. These are starting recommendations -- you are encouraged to customize your selections to reflect your organization's unique roles and priorities.

## Professional Services

Professional services firms such as consulting, accounting, and legal practices depend on deep client relationships, specialized expertise, and the ability to deliver high-quality advisory work. The following competencies support talent evaluation across common professional services roles.

Competency	Why It Matters
Account Management	Central to maintaining and growing client relationships that drive recurring revenue.
Client Engagement	Ensures service teams build trust and deliver value that keeps clients invested.
Consultative Selling	Enables professionals to act as trusted advisors rather than transactional vendors.
Business Acumen	Helps professionals understand how client organizations operate to provide relevant guidance.
Project Management	Critical for delivering engagements on time, on budget, and within scope.
Stakeholder Management	Essential for navigating complex client organizations with multiple decision-makers.
Contract Negotiation	Supports the structuring of mutually beneficial agreements with clients and partners.
Critical Thinking	Drives the analytical rigor required for strategy, audit, and advisory work.

Presentation Skills	Key for pitching services, delivering findings, and leading client workshops.
Business Development	Supports firm growth through identifying and pursuing new opportunities.
Professionalism	Maintains the credibility and reputation that professional services firms rely on.
Accountability	Ensures delivery of commitments and maintains client trust and satisfaction.
Adaptability	Allows response to changing client needs and unexpected engagement challenges.
Decision Making	Guides sound judgment in complex advisory situations and client recommendations.
Effective Communication	Underpins every client interaction, deliverable, and internal collaboration.
Emotional Intelligence	Enhances client relationships and strengthens team dynamics.
Leadership	Essential for managing teams and growing advisory practices.
Performance Management	Ensures team members meet quality and productivity standards.
Problem Solving	Addresses complex client challenges with structured analytical approaches.
Resilience	Sustains performance through demanding client engagements and tight deadlines.
Team Leadership	Guides engagement teams toward delivery excellence and collaboration.
Teamwork and Collaboration	Drives cross-functional cooperation on multi-disciplinary engagements.
Technology Proficiency	Enables effective use of collaboration, analytics, and project delivery tools.
Time Management	Maximizes billable hours and client delivery efficiency.

# Manufacturing

Manufacturing organizations require a workforce skilled in production operations, quality assurance, safety, and supply chain management. The following competencies address talent needs across plant operations, engineering, logistics, and continuous improvement roles.

Competency	Why It Matters
Lean Manufacturing and Continuous Improvement	Drives operational excellence through waste reduction and process optimization.
Manufacturing Quality Control	Ensures all products meet internal specifications and external quality standards.
Quality Management	Establishes the standards and processes that maintain consistent production outputs.
Workplace Safety Management	Protects employees and ensures compliance with occupational health and safety regulations.
Equipment Operation and Maintenance	Ensures operational uptime and longevity of critical production assets.
Inventory and Materials Management	Optimizes the lifecycle of raw materials from sourcing through distribution.
Global Supply Chain Management	Balances cost, speed, and sustainability across international operations.
Logistics and Transportation Management	Optimizes the movement of goods while ensuring visibility across distribution networks.
Procurement Operations	Manages end-to-end purchasing to ensure supplier quality and cost efficiency.
Product Design and Development	Supports innovation and the creation of new products to meet market needs.
Prototype Development and Testing	Validates concepts and refines functionality before full-scale production.
Regulatory Compliance	Ensures manufacturing operations adhere to all applicable laws and industry standards.

Accountability	Ensures delivery of production targets and safety commitments.
Adaptability	Enables response to production changes and market demand fluctuations.
Decision Making	Supports rapid choices on production priorities and resource allocation.
Effective Communication	Critical for coordinating across production teams and shifts.
Emotional Intelligence	Strengthens supervisor-worker relationships and fosters a positive plant culture.
Leadership	Essential for managing production teams and implementing improvements.
Performance Management	Drives accountability for safety, quality, and productivity metrics.
Problem Solving	Addresses production issues and process bottlenecks quickly.
Resilience	Maintains focus during production disruptions and supply chain challenges.
Team Leadership	Inspires and directs shift teams to meet production goals.
Teamwork and Collaboration	Fosters cooperation across maintenance, quality, and production teams.
Technology Proficiency	Supports adoption of manufacturing systems, ERP tools, and automation.
Time Management	Ensures production schedules and delivery deadlines are met.

## Health Care

Health care organizations operate in a highly regulated environment where patient safety, clinical quality, and regulatory compliance are paramount. The following competencies support talent evaluation across clinical, administrative, and operational health care roles.

Competency	Why It Matters
Patient Assessment and Care Planning	Foundational to delivering personalized, evidence-based patient care.
Clinical Documentation	Ensures continuity of care, legal compliance, and accurate billing.
Clinical Operations Management	Supports the delivery of high-quality care through resource allocation and workflow optimization.
Healthcare Regulatory Compliance	Protects patient safety and mitigates legal risk through adherence to medical regulations.
Healthcare Quality Improvement	Drives initiatives that enhance patient outcomes, safety, and operational standards.
Medication Administration and Safety	Prevents medical errors through adherence to safety protocols.
Infection Prevention and Control	Protects patients and staff through evidence-based prevention practices.
Patient and Family Education	Ensures patients and families understand clinical instructions for better outcomes.
Health Information Systems Management	Supports high-quality data sharing, security, and interoperability.
Laboratory Operations Management	Ensures high-quality laboratory outputs and regulatory compliance.
Laboratory Safety and Compliance	Manages preventive approaches to safety from biological, chemical, and physical hazards.
Ethical Judgment and Integrity	Guides sound decisions in complex clinical and administrative situations.
Accountability	Ensures patient safety and care quality standards are maintained.

Adaptability	Enables response to changing patient conditions and care priorities.
Decision Making	Guides critical clinical and operational decisions under time pressure.
Effective Communication	Critical for patient education and interdisciplinary care coordination.
Emotional Intelligence	Enhances patient empathy and strengthens care team dynamics.
Leadership	Guides healthcare teams toward quality and safety objectives.
Performance Management	Tracks quality metrics and clinical outcomes.
Problem Solving	Addresses patient care challenges and system improvements.
Resilience	Sustains performance in high-stress clinical environments.
Team Leadership	Coordinates interdisciplinary care teams.
Teamwork and Collaboration	Essential for safe, coordinated patient care.
Technology Proficiency	Supports effective use of EHR systems and clinical technology.
Time Management	Balances patient care demands with administrative responsibilities.

## Finance & Insurance

Finance and insurance organizations operate under strict regulatory oversight and require precision in risk assessment, compliance, and financial management. The following competencies support roles across banking, investment management, insurance, and financial advisory services.

Competency	Why It Matters
Financial Risk Management	Identifies, assesses, and mitigates credit, market, and liquidity risks.
Credit Risk Assessment	Evaluates borrower creditworthiness to ensure organizational stability.
Credit Management	Establishes appropriate credit limits and collection strategies.
Financial Reporting and Analysis	Provides insights into organizational performance and financial health.
Audit Management	Assesses organizational controls and ensures compliance with financial regulations.
Corporate and Regulatory Compliance	Prevents legal and reputational risk through adherence to laws and regulations.
Fraud Detection and Prevention	Implements controls and monitoring to identify and stop fraudulent activities.
Commercial Lending	Supports the evaluation, structuring, and management of business credit facilities.
Loan Origination and Processing	Manages the end-to-end lifecycle of loan applications with regulatory compliance.
Insurance Underwriting and Risk Selection	Determines coverage eligibility, pricing, and organizational risk exposure.
Insurance Regulatory Compliance	Ensures insurance products and operations adhere to applicable laws and standards.
Claims Investigation and Adjudication	Ensures accurate and compliant resolution of insurance claims.
Accountability	Ensures accuracy in financial records and regulatory filings.

Adaptability	Enables response to regulatory changes and market volatility.
Decision Making	Guides sound risk and credit decisions with incomplete information.
Effective Communication	Essential for explaining complex financial products to clients.
Emotional Intelligence	Builds client trust and strengthens stakeholder relationships.
Leadership	Guides teams toward compliance and quality standards.
Performance Management	Tracks compliance and financial metrics.
Problem Solving	Addresses regulatory issues and process gaps.
Resilience	Maintains composure through market downturns and audit pressures.
Team Leadership	Directs cross-functional teams in complex financial operations.
Teamwork and Collaboration	Fosters cooperation across risk, compliance, and operations teams.
Technology Proficiency	Supports effective use of financial platforms and analytics tools.
Time Management	Manages reporting deadlines and regulatory filing schedules.

## Construction

Construction firms manage complex, multi-stakeholder projects that require rigorous safety standards, precise project execution, and effective resource management. The following competencies address talent needs across project management, field operations, estimating, and safety roles.

Competency	Why It Matters
Project Management	Manages construction projects from initiation to completion across resources, stakeholders, and constraints.
Project Planning	Defines scopes, sets objectives, and develops comprehensive plans with timelines and milestones.
Project Execution	Ensures project activities are completed on time and within technical requirements.
Project Risk Management	Identifies, assesses, and mitigates potential risks to project objectives.
Project Financial Management	Plans, monitors, and controls project budgets and expenses.
Workplace Safety Management	Protects workers and ensures compliance with occupational health and safety regulations.
Contract Administration	Manages and monitors contract terms throughout the project lifecycle.
Contract Negotiation	Reaches mutually beneficial agreements with subcontractors, suppliers, and clients.
Procurement Operations	Manages end-to-end purchasing of materials and services for construction projects.
Vendor Relationship Management	Optimizes strategic partnerships with subcontractors and material suppliers.
Equipment Operation and Maintenance	Ensures safe operation and uptime of construction equipment.
Regulatory Compliance	Ensures construction activities adhere to building codes, permits, and regulations.
Accountability	Ensures project commitments and safety standards are met.

Adaptability	Enables response to weather delays, design changes, and site conditions.
Decision Making	Supports timely choices on scheduling, resources, and safety priorities.
Effective Communication	Critical for coordinating multiple trades and stakeholders.
Emotional Intelligence	Strengthens relationships across diverse crews and subcontractors.
Leadership	Guides job site teams toward safety and schedule goals.
Performance Management	Tracks safety, quality, and schedule metrics.
Problem Solving	Addresses technical challenges and coordination issues.
Resilience	Maintains focus through project setbacks and demanding site conditions.
Team Leadership	Inspires cooperation across multiple trades.
Teamwork and Collaboration	Essential for safe, coordinated job site operations.
Technology Proficiency	Enables use of project management software and BIM tools.
Time Management	Keeps projects on schedule across multiple concurrent activities.

## Retail Trade

Retail organizations need to balance customer experience, inventory management, and operational efficiency across store and corporate functions. The following competencies support talent evaluation across store operations, merchandising, marketing, and supply chain roles.

Competency	Why It Matters
Retail Store Operations	Optimizes day-to-day store functions including customer satisfaction and financial profitability.
Customer Experience Management	Designs customer-centric journeys that ensure satisfaction and drive advocacy.
Customer Acquisition and Retention	Develops strategies to attract new customers and build long-term loyalty.
Merchandise Management	Plans and manages product portfolios to meet customer demand and optimize margins.
Inventory and Cost Control	Manages stock procurement, valuation, and distribution for financial efficiency.
Pricing Strategy and Methods	Determines optimal price points by analyzing demand, competition, and cost structures.
Loss Control and Prevention	Minimizes financial, physical, or reputational loss through proactive risk measures.
Omnichannel Marketing	Integrates multiple marketing channels into a cohesive customer experience.
Digital Marketing and Social Media	Leverages digital channels to build brand awareness and drive engagement.
Demand Planning and Forecasting	Predicts future customer demand to optimize inventory and supply chain efficiency.
Vendor Relationship Management	Ensures quality and cost-efficiency from product suppliers.
People Management	Leads and develops retail teams to achieve high performance.
Accountability	Ensures store performance goals and standards are met.

Adaptability	Enables response to market trends and competitive changes.
Decision Making	Supports rapid choices on merchandising, staffing, and promotions.
Effective Communication	Critical for directing store teams and coaching staff.
Emotional Intelligence	Enhances customer and employee interactions.
Leadership	Guides retail teams toward sales and service goals.
Performance Management	Tracks sales, inventory, and customer satisfaction metrics.
Problem Solving	Addresses operational challenges and customer complaints.
Resilience	Sustains energy through high-traffic periods and seasonal demands.
Team Leadership	Motivates front-line staff in a fast-paced environment.
Teamwork and Collaboration	Drives coordination between store, warehouse, and corporate teams.
Technology Proficiency	Supports effective use of POS systems and retail analytics platforms.
Time Management	Balances multiple priorities in high-traffic retail settings.

## Real Estate

Real estate organizations require expertise in property management, financial analysis, client relationships, and regulatory compliance. The following competencies support talent evaluation across brokerage, property management, development, and investment roles.

Competency	Why It Matters
Account Management	Builds and maintains strategic relationships with property owners, tenants, and investors.
Client Engagement	Ensures high levels of satisfaction, trust, and mutual growth with clients.
Contract Negotiation	Structures mutually beneficial lease, purchase, and partnership agreements.
Contract Administration	Manages and monitors lease and contract terms throughout their lifecycle.
Financial Analysis Application	Evaluates business performance and identifies growth opportunities in property investments.
Financial Budget Management	Plans and monitors financial resources for property portfolios and development projects.
Market Research and Analysis	Gathers and interprets data about property markets, competitors, and conditions.
Asset Management	Maximizes property value through strategic acquisition, deployment, and maintenance.
Regulatory Compliance	Ensures real estate activities adhere to zoning, licensing, and property laws.
Negotiation	Reaches mutually beneficial agreements in property transactions and partnerships.
Business Development	Identifies new opportunities and builds strategic partnerships to grow the portfolio.
Strategic Planning	Develops long-term goals and actionable plans for portfolio growth and market positioning.
Accountability	Ensures property performance targets and lease compliance.

Adaptability	Enables response to changing market conditions and property issues.
Decision Making	Guides sound judgment in property acquisition and investment decisions.
Effective Communication	Essential for tenant and investor relations.
Emotional Intelligence	Enhances client relationships and conflict resolution.
Leadership	Guides property management teams effectively.
Performance Management	Tracks occupancy, profitability, and maintenance metrics.
Problem Solving	Addresses tenant issues and property maintenance challenges.
Resilience	Maintains focus through market cycles and deal complexities.
Team Leadership	Directs property management and brokerage teams toward portfolio goals.
Teamwork and Collaboration	Fosters cooperation across brokerage, finance, and property management.
Technology Proficiency	Enables use of property management software and market analytics.
Time Management	Balances portfolio management with client demands.

## Hospitality

Hospitality businesses must deliver exceptional guest experiences while managing complex food service, lodging, and event operations. The following competencies address talent needs across hotel management, food and beverage, event coordination, and guest services roles.

Competency	Why It Matters
Guest Experience Management	Designs and manages end-to-end guest journeys to ensure loyalty and brand consistency.
Front Office Operations	Manages guest reception, registration, and room assignments with high service quality.
Front-of-House Service Management	Oversees dining and service areas to ensure seamless guest experiences.
Food and Beverage Operations	Optimizes day-to-day production and service functions of food establishments.
Kitchen Production Management	Oversees food preparation timing and staff coordination in commercial kitchens.
Food Safety and HACCP Compliance	Manages systematic preventive approaches to food safety hazards.
Menu Engineering and Pricing	Designs strategically optimized offerings and pricing models to maximize revenue.
Housekeeping and Facilities Management	Ensures cleanliness, safety, and professional upkeep of physical spaces.
Event Management	Plans, organizes, and executes events that align with organizational goals.
Customer Experience Management	Designs customer-centric journeys that foster emotional connection and advocacy.
Revenue Cycle Management	Optimizes organizational payment flow from client intake to final payment.
People Management	Leads and develops hospitality teams in a high-turnover environment.

Accountability	Ensures service standards and guest satisfaction commitments.
Adaptability	Enables quick response to guest requests and operational changes.
Decision Making	Supports real-time choices on guest service and staffing priorities.
Effective Communication	Critical for guest interactions and team coordination.
Emotional Intelligence	Enhances guest service recovery and team engagement.
Leadership	Guides hospitality teams toward service excellence.
Performance Management	Tracks service quality and occupancy metrics.
Problem Solving	Addresses guest complaints and operational issues quickly.
Resilience	Sustains service quality through peak seasons and high-pressure situations.
Team Leadership	Inspires front-line teams in a high-turnover environment.
Teamwork and Collaboration	Drives coordination across front desk, housekeeping, and F&B teams.
Technology Proficiency	Supports effective use of PMS, POS, and reservation systems.
Time Management	Manages multiple guest needs and operational priorities.

## Education

Education organizations span K-12 schools, higher education institutions, and training providers, all requiring strong academic program oversight, regulatory compliance, and student-centered service delivery. The following competencies support talent evaluation across teaching, administration, student services, and academic leadership roles.

Competency	Why It Matters
Academic Program Administration	Oversees the design, implementation, and maintenance of educational programs with academic rigor.
Accreditation and Assessment Management	Manages evaluation against external benchmarks and documentation required for formal accreditation.
Education Policy and Compliance	Ensures institutions adhere to all applicable legal, regulatory, and accreditation standards.
Faculty and Staff Supervision	Leads and develops academic and administrative personnel to achieve departmental goals.
Student Services Management	Oversees support programs for students to ensure efficient service delivery and positive outcomes.
School Operations Management	Manages daily non-academic functions including facility logistics, resources, and safety protocols.
Instructional Design	Designs and implements educational programs and materials that optimize learning outcomes.
Training Delivery	Facilitates educational programs using diverse instructional methods to optimize learner outcomes.
Research Project Design	Develops and oversees methodology, resource allocation, and timelines for research initiatives.
Research Documentation and Record Keeping	Manages systematic gathering, organization, and validation of research data for compliance.
Learning Culture Development	Fosters an environment that values continuous curiosity, knowledge sharing, and professional growth.
Stakeholder Management	Manages relationships with parents, governing bodies, donors, and community partners.
Accountability	Ensures academic standards and student success outcomes.

Adaptability	Enables response to changing educational needs and methodologies.
Decision Making	Guides curriculum and resource allocation choices for student success.
Effective Communication	Critical for instruction and stakeholder engagement.
Emotional Intelligence	Enhances student learning and faculty collaboration.
Leadership	Guides educational teams toward learning objectives.
Performance Management	Tracks student outcomes and faculty performance.
Problem Solving	Addresses learning challenges and institutional issues.
Resilience	Maintains focus through budget constraints and evolving education policies.
Team Leadership	Coordinates teaching staff and administrative teams toward shared goals.
Teamwork and Collaboration	Drives cooperation among faculty, staff, and community partners.
Technology Proficiency	Supports effective use of learning management systems and EdTech tools.
Time Management	Manages academic calendars and operational priorities.

## Legal

Legal organizations including law firms, corporate legal departments, and compliance teams require rigorous analytical skills, meticulous documentation, and deep regulatory knowledge. The following competencies support talent evaluation across litigation, corporate counsel, compliance, contract management, and legal operations roles.

Competency	Why It Matters
Legal Research and Writing	Supports the systematic gathering, organization, and validation of legal authorities for case proceedings.
Discovery and Litigation Support	Manages evidence gathering and organization to support legal proceedings and compliance requirements.
Case and Matter Management	Oversees specific legal matters from intake to resolution while ensuring compliance and data integrity.
Contract Negotiation	Reaches mutually beneficial agreements while protecting organizational value and managing trade-offs.
Contract Administration	Manages and monitors contract terms throughout their lifecycle to ensure operational compliance.
Corporate and Regulatory Compliance	Ensures the organization adheres to all relevant laws, regulations, and internal policies.
Ethical Judgment and Integrity	Guides sound decisions based on moral principles, professional responsibility, and organizational values.
Critical Thinking	Drives the analytical rigor required to evaluate evidence, interpret statutes, and form legal arguments.
Attention to Detail	Ensures accuracy in legal documents, filings, and contract language where precision is essential.
Client Engagement	Builds and maintains strong, value-based relationships with clients to ensure satisfaction and trust.
Conflict Resolution	Facilitates the discovery of solutions to disputes by identifying root causes and fostering open communication.
Information Gathering and Analysis	Identifies, collects, and interprets data from diverse sources to support evidence-based legal decisions.

Accountability	Ensures compliance with legal standards and client commitments.
Adaptability	Enables response to changing legal requirements and case developments.
Decision Making	Guides sound judgment on legal strategy and risk.
Effective Communication	Critical for client counsel and stakeholder engagement.
Emotional Intelligence	Strengthens client relationships and supports team morale under pressure.
Leadership	Guides legal teams and manages litigation.
Performance Management	Tracks case outcomes and billable metrics.
Problem Solving	Addresses complex legal issues and procedural challenges.
Resilience	Sustains performance through demanding caseloads and litigation pressure.
Team Leadership	Directs associate attorneys and legal support staff effectively.
Teamwork and Collaboration	Drives cooperation across litigation, compliance, and advisory teams.
Technology Proficiency	Supports effective use of legal research databases and case management tools.
Time Management	Manages caseloads and legal deadlines.

# Appendix

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## A. HRSG Basic Library to ClearCo Library Migration Table

The following table shows the ClearCo competency that will replace the HRSG competency from the “Available - Basic” section under Tools > Setup > Manage Competencies if an organization requests to run the replacement.

Competency - Basic	ClearCo Competency
Account Planning	Account Management
Accounting and Financial Systems, Processes and Technology	Accounting and Financial Systems Management
Accounting and Reporting	Financial Reporting and Analysis
Achievement Orientation	Self-Motivation
Acting with Empathy and Compassion	Emotional Intelligence
Adaptability	Adaptability
Advertising and Sales Promotion	Marketing Communications Management
Agility	Flexibility
Analytical Thinking	Critical Thinking
Application Development and Maintenance	Software Development and Programming
Application Support	Systems Administration
Architecture	Enterprise and Solution Architecture
Asset Management	Asset Management
Attention to Detail	Attention to Detail
Auditing	Audit Management
Branding and Positioning	Brand Strategy and Positioning
Business Analysis	Business Analysis
Business Development	Business Development

Business Needs Analysis	Business Process Management
Business Perspective	Business Acumen
Capital Asset Accounting	Fixed Asset Accounting
Capital Markets	Capital Markets
Career Development and Coaching	Talent Development
Cash Management	Cash Flow Management
Change Management	Change Management
Client Focus	Client Engagement
Collaborating with Others	Teamwork and Collaboration
Compensation and Benefits Administration	Compensation and Benefits Administration
Competency Management	Competency Framework Development
Concern for Safety	Workplace Safety Management
Consulting and Advising	Stakeholder Management
Content Marketing	Content Marketing
Continuous Learning	Continuous Learning
Contract Review and Recommendations	Contract Administration
Corporate Finance	Financial Acumen
Corporate Governance	Corporate Governance
Cost Accounting	Cost Accounting
Cost Management/Internal Controls Assessment	Internal Controls Assessment
Creativity and Innovation	Creativity and Innovation
Credit Management	Credit Management
Customer Experience Management	Customer Experience Management
Customer Relationship Management	Customer Acquisition and Retention
Customer Value Management	Customer Value Optimization
Cyber Security	Network Security Management

Data Literacy	Data Visualization and Reporting
Database Administration	Database Management
Database Design	Database Architecture and Design
Debt Management	Debt Management
Decision Making	Decision Making
Digital Literacy	Digital Literacy
Digital Marketing	Digital Marketing and Social Media
Diversity and Inclusion	Diversity and Inclusion
Embracing Diversity	Inclusive Practices
Emotional Intelligence	Self-Awareness
Employee Engagement and Retention Management	Employee Engagement
Employee Relations	Employee Relations
Employment Legislation, Policies, and Procedures	Employment Law and Compliance
Ensuring Accountability	Accountability
Event Management	Event Management
Exemplifying Integrity	Ethical Judgment and Integrity
External Reporting - Securities Commissions & Governmental	External Regulatory Reporting
Facilitation	Group Process Management and Moderation
Financial Budgeting, Planning and Reporting	Financial Budget Management
Financial Policy Development, Interpretation and Application	Financial Policy and Standards Development
Financial Risk Management	Financial Risk Management
Fostering Communication	Effective Communication
Fostering Learning and Development	Learning Culture Development

Fraud Detection and Control	Fraud Detection and Prevention
Global Business Perspective - Business Acumen	Global Supply Chain Management
Global Sourcing	Strategic Sourcing
Human Resources Management	HR Management
IT Support Troubleshooting	IT Help Desk and User Support
Impact and Influence	Influence and Persuasion
Improving Business Processes	Business Processes Improvement
Information Gathering and Processing	Information Gathering and Analysis
Information Management	Information Management
Infrastructure	IT Infrastructure Management
Initiative	Initiative
Inspiring Others	Leadership
Integrated Marketing Communications	Integrated Marketing Communications
Inventory/Supply Management	Inventory and Materials Management
Leading Change	Change Leadership
Learning Delivery	Training Delivery
Learning Solutions Development	Instructional Design
Learning and Development	Professional Development
Logistics and Transportation Management	Logistics and Transportation Management
Managing Conflicts	Conflict Resolution
Managing Project Communications	Project Communications
Managing Project Execution	Project Execution
Managing Resources	Resource Allocation
Managing the Sales Process	Consultative Selling
Market Research & Consumer Behavior	Market Research and Analysis

Market, Industry and Competitive Knowledge	Industry Knowledge
Marketing Metrics	Marketing Performance Measurement
Marketing Planning & Analysis	Marketing Planning
Marketing Strategy	Strategic Marketing
Media and Public Relations	Media and Public Relations
Mergers and Acquisitions	Mergers and Acquisitions
Multi-Channel Marketing	Omnichannel Marketing
Negotiating	Negotiation
Negotiation	Contract Negotiation
Networking	Networking
Nurturing Innovation	Innovation Management
Occupational Health and Safety	Occupational Health Programs
Optimizing Shareholder Value	Shareholder Value Management
Organizational Analysis and Design	Organizational Development
Organizational Awareness	Organizational Savvy
Organizational Performance Analysis	Business Performance Analysis
Partnering	Strategic Partnerships Management
Payroll Processing	Payroll Administration
Performance Management	Performance Management
Planning and Organizing	Organization and Planning
Policy and Standards Design and Development	Policy and Standards Development
Presentation	Presentation Skills
Pricing Concepts and Methods	Pricing Strategy and Methods
Problem Solving	Problem Solving

Processing and Recording Financial Transactions	Accounts Payable and Receivable Management
Procurement Management	Procurement Operations
Product and Service Development	Product Design and Development
Product and Technical Knowledge	Technical Product Expertise
Project Management	Project Management
Project Planning	Project Planning
Project Risk Management	Project Risk Management
Quality Focus	Concern for Quality
Quality Management and Assurance	Quality Management
Reconciliation and Analysis	Financial Reconciliation
Recruitment and Selection	Recruitment and Selection
Requirements Analysis	Requirement Analysis
Resilience	Resilience
Revenue and Profitability Management	Revenue Cycle Management
Service Management Processes	IT Service Management
Sourcing	Sourcing Operations
Strategic Human Resources Planning	HR Strategic Planning
Strategic Planning of Sourcing Requirements	Demand Planning and Forecasting
Strategic Sales Planning	Strategic Sales Planning
Supplier Relationship Management	Supplier Relationship Management
System Design	System Design
Systems Integration	Systems Integration
Talent Management	Talent Strategy
Team Leadership	Team Leadership

Telecommunications Network	Network Configuration and Troubleshooting
Territory Management	Territory Management
Testing	Quality Control and Testing
Thinking Strategically	Strategic Planning
Using Financials	Financial Analysis Application
Vendor Management	Vendor Relationship Management
Visioning and Alignment	Vision and Strategy Alignment
Warehouse/Stores Management	Warehouse and Distribution Management
Workforce Planning	Workforce Planning

## B. HRSG Comprehensive Library to ClearCo Library Migration Table

The table below shows the ClearCo competency that will replace the HRSG competency from the “Available - Comprehensive” section under Tools > Setup > Manage Competencies if an organization requests to run the replacement.

Competency - Comprehensive	ClearCo Competency
Account Management	Account Management
Accounting and Financial Systems, Processes and Technology	Accounting and Financial Systems Management
Accounting and Reporting	Financial Reporting and Analysis
Achievement Orientation	Self-Motivation
Acting with Empathy and Compassion	Emotional Intelligence
Adaptability	Adaptability
Advertising and Sales Promotion	Marketing Communications Management
Analytical Thinking	Critical Thinking
Application Development, Support and Maintenance	Software Development and Programming
Architecture	Enterprise and Solution Architecture
Asset Management	Asset Management
Attention to Detail	Attention to Detail
Auditing	Audit Management
Branding and Positioning	Brand Strategy and Positioning
Bridging Cultures	Cultural Competence
Business Analysis	Business Analysis
Business Needs Analysis	Business Process Management
Business Partnering	Cross-Functional Collaboration
Business Perspective	Business Acumen

Capital Asset Accounting	Fixed Asset Accounting
Capital Markets	Capital Markets
Career Development and Coaching	Talent Development
Cash Management	Cash Flow Management
Change Management	Change Management
Client Focus	Client Engagement
Compensation and Benefits Administration	Compensation and Benefits Administration
Competency Management	Competency Framework Development
Concern for Safety	Workplace Safety Management
Consultative Selling Process	Consultative Selling
Consulting and Advising	Stakeholder Management
Content Marketing	Content Marketing
Continuous Learning	Continuous Learning
Contract Review and Recommendations	Contract Administration
Corporate Finance	Financial Acumen
Corporate Governance	Corporate Governance
Corporate Social Responsibility	Corporate Social Responsibility
Cost Accounting	Cost Accounting
Cost Management/Internal Controls Assessment	Internal Controls Assessment
Creativity and Innovation	Creativity and Innovation
Credit Management	Credit Management
Critical Judgment	Decision Making
Customer Experience Management	Customer Experience Management
Customer Relationship Management	Customer Acquisition and Retention
Customer Value Management	Customer Value Optimization
Database Design and Management	Database Management

Debt Management	Debt Management
Decision Making	Strategic Decision Making
Digital Marketing	Digital Marketing and Social Media
Diversity and Inclusion	Diversity and Inclusion
Embracing Diversity	Inclusive Practices
Employee Engagement and Retention Management	Employee Engagement
Employee Relations	Employee Relations
Employment Legislation, Policies, and Procedures	Employment Law and Compliance
Ensuring Accountability	Accountability
Event Management	Event Management
Exemplifying Integrity	Ethical Judgment and Integrity
External Reporting - Securities Commissions & Governmental	External Regulatory Reporting
Facilitation	Group Process Management and Moderation
Financial Budgeting, Planning and Reporting	Financial Budget Management
Financial Policy Development, Interpretation and Application	Financial Policy and Standards Development
Financial Risk Management	Financial Risk Management
Fostering Communication	Effective Communication
Fostering Learning and Development	Learning Culture Development
Fraud Detection and Control	Fraud Detection and Prevention
Global Business Perspective - Business Acumen	Global Supply Chain Management
Global Sourcing	Strategic Sourcing
Human Resources Management	HR Management

IT Procurement and Asset Management	IT Vendor and Asset Management
IT Project Management	IT Project Management
IT Support Troubleshooting	IT Help Desk and User Support
Impact and Influence	Influence and Persuasion
Improving Business Processes	Business Processes Improvement
Industry Knowledge	Industry Knowledge
Information Gathering and Processing	Information Gathering and Analysis
Information Management	Information Management
Infrastructure/Platforms	IT Infrastructure Management
Initiative	Initiative
Inspiring Others	Leadership
Integrated Marketing Communications	Integrated Marketing Communications
Inventory/Supply Management	Inventory and Materials Management
Leading Change	Change Leadership
Learning Delivery	Training Delivery
Learning Solutions Development	Instructional Design
Learning and Development	Professional Development
Logistics and Transportation Management	Logistics and Transportation Management
Managing Conflicts	Conflict Resolution
Managing People	People Management
Managing Project Communications	Project Communications
Managing Project Execution	Project Execution
Managing Resources	Resource Allocation
Market Research & Consumer Behaviour	Market Research and Analysis
Marketing Metrics	Marketing Performance Measurement
Marketing Planning & Analysis	Marketing Planning

Marketing Strategy	Strategic Marketing
Media and Public Relations	Media and Public Relations
Merchandising/Retailing	Merchandise Management
Mergers and Acquisitions	Mergers and Acquisitions
Multi-Channel Marketing	Omnichannel Marketing
Negotiating	Negotiation
Negotiation	Contract Negotiation
Networking	Networking
Nurturing Innovation	Innovation Management
Occupational Health and Safety	Occupational Health Programs
Optimizing Shareholder Value	Shareholder Value Management
Organizational Analysis and Design	Organizational Development
Organizational Performance Analysis	Business Performance Analysis
Organizational Savvy	Organizational Savvy
Partnering	Strategic Partnerships Management
Payroll Processing	Payroll Administration
Performance Management	Performance Management
Planning and Organizing	Organization and Planning
Policy and Standards Design and Development	Policy and Standards Development
Pricing Concepts & Methods	Pricing Strategy and Methods
Problem Solving	Problem Solving
Processes, Methodologies, and Tools	Technology Proficiency
Processing and Recording Financial Transactions	Accounts Payable and Receivable Management
Procurement Management	Procurement Operations
Product Development	Product Design and Development

Product and Technical Knowledge	Technical Product Expertise
Project Finance, Risk and Cash Management	Project Financial Management
Project Management	Project Management
Project Planning	Project Planning
Project Risk & Change Management	Project Risk Management
Quality Focus	Concern for Quality
Quality Management and Assurance	Quality Management
Reconciliation and Analysis	Financial Reconciliation
Recruitment and Selection	Recruitment and Selection
Requirements Analysis	Requirement Analysis
Resilience	Resilience
Revenue and Profitability Management	Revenue Cycle Management
Risk Taking	Calculated Risk Taking
Security/Information and Application Protection	Security Operations and Monitoring
Self-Awareness	Self-Awareness
Service Management Processes	IT Service Management
Sourcing	Sourcing Operations
Store Operations	Retail Store Operations
Strategic Human Resource Planning	HR Strategic Planning
Strategic Planning of Sourcing Requirements	Demand Planning and Forecasting
Strategic Sales Planning	Strategic Sales Planning
Supplier Relationship Management	Supplier Relationship Management
System Design	System Design
Systems Integration and Porting	Systems Integration

Talent Management	Talent Strategy
Team Leadership	Team Leadership
Teamwork	Teamwork and Collaboration
Telecommunications (Data and Voice) Network	Network Configuration and Troubleshooting
Thinking Strategically	Strategic Planning
Time and Territory Management	Territory Management
Using Financials	Financial Analysis Application
Using Information Technology	Digital Literacy
Vendor Management	Vendor Relationship Management
Visioning and Alignment	Vision and Strategy Alignment
Workforce Planning	Workforce Planning

## C. Additional Competencies

The following is a list of competencies that were added to complement the competencies that were mapped to the basic and comprehensive competency libraries:

- Academic Program Administration
- Accreditation and Assessment Management
- Active Listening
- Case and Matter Management
- Claims Investigation and Adjudication
- Clinical Documentation
- Clinical Operations Management
- Commercial Lending
- Corporate and Regulatory Compliance
- Credit Risk Assessment
- Data Visualization and Reporting
- Deposit and Account Services Management
- Discovery and Litigation Support
- Education Policy and Compliance
- Equipment Operation and Maintenance
- Faculty and Staff Supervision
- Food and Beverage Operations
- Food Safety and HACCP Compliance
- Front Office Operations
- Front-of-House Service Management
- Guest Experience Management
- Health Information Systems Management
- Healthcare Quality Improvement
- Healthcare Regulatory Compliance
- Housekeeping and Facilities Management
- Incident Detection and Response
- Infection Prevention and Control
- Insurance Regulatory Compliance
- Insurance Underwriting and Risk Selection
- Inventory and Cost Control
- Kitchen Production Management
- Laboratory Operations Management
- Laboratory Safety and Compliance
- Lean Manufacturing and Continuous Improvement
- Legal Research and Writing
- Loan Origination and Processing
- Loss Control and Prevention

- Manufacturing Quality Control
- Medication Administration and Safety
- Menu Engineering and Pricing
- Network Security Management
- Patient and Family Education
- Patient Assessment and Care Planning