Guidance Notes for Competency Matrices and Multi-Perspective Feedback Tool

These notes relate to the free tools offered by the Experiential Learning Centre in support of the book Brilliant Leader by Simon Cooper, our Chief Executive. These tools may used and distributed free of charge as long as our copyright notice and acknowledgements remain intact. They may not be sold or used for commercial gain. Neither the Experiential Learning Centre or Simon Cooper accepts any responsibility or liability for how the tools are used or any issues arising from their use.

Competency Matrices
Two worksheets are provided, one for Leadership Competencies and the other for core Business Skills Competencies. Both can be edited according to the needs of your team and/or organisation. In the first column there is a list of competencies and a description of what it means to be competent in each area. The competency list can be edited by removing or adding competency areas. The descriptors can be edited by entering the **comments** field from the **insert** drop down menu.

In dialogue with each staff member (strongly recommended) the leader is able to complete the competency matrix for their team according to the scale shown – this is consistent with the principles of Competency Based Leadership in the first chapter of the book. The completed matrix provides a visual view of the team and enables the leader to identify and prioritise development needs.

It is good practice to save the document as a different file name each time the matrix is updated in order to provide a record of the team's progress and development. You should also store these records securely by either password protection or encryption as they form part of each person's personnel records. Similarly, any print out of the matrix should also be kept securely.

Multi-Perspective Feedback Tools
These use the same competencies as the competency matrices and enable the capture of multi-perspective feedback; self, boss, peers and other team members, editable as appropriate. When more than one peer or team member is providing input the total score for each cell should be divided by the number of entrants in d4 or e4 respectively - e.g. =sum(x/d4).

An average score of 3 or 4 in any competency area implies a potential development need that should be explored further. However, we recommend that scores are used as the basis for discussion rather than being definitive and further evidence and examples may need to be sought if there is disagreement relating to a person's competence.

Any feedback that is sought from others should be anonymous (to the person being assessed) to avoid positive bias. It should also be explained what the feedback is for and how it is to be used. It requires emotional maturity in order for feedback to be fair and objective and is therefore, not suitable for all teams and all environments.

When development needs have been identified we recommend that professional support is canvassed in order to ensure the most appropriate development activities are employed such as leap experiences, coaching, experiential workshops, training courses or self development. The Experiential Learning Centre is able to assist you in finding the most appropriate solutions to support your development plan.

Please contact us to discuss your situation.