USING THE PROFESSIONAL MAP TO SUPPORT ROLE DESIGN

The Professional Map sets the international benchmark of excellence for the insurance and personal finance professions, describing the competencies needed to succeed in the workplace and drive good customer outcomes. Each competency includes several measurable or observable performance statements (the competency standards) that can aid you in defining your talent management processes such as role design.

WHO IT'S FOR	**WHAT YOU'LL GET**	**WHY YOU NEED IT**	**WHEN IT APPLIES**
HR practitioners, Operations / Office managers with HR responsibilities, line managers	Help with applying the Professional Map to job descriptions and person specifications	Competency-based job descriptions support a consistent approach to selection and performance management	During the recruitment and performance management cycles

What is this help sheet for?

Role design is the process that establishes an employee's critical responsibilities and accountabilities and how these relate to the organisational structure and strategy. The output of this process is a job description and person specification to support both the recruitment into the role and the performance expectations for the successful candidate.

This help sheet focuses on how to use the Professional Map to develop job descriptions and person specifications.

What are job descriptions and person specifications?

When we refer to a **job description,** we mean the document that sets out of the overall purpose of a role and the critical responsibilities and accountability of the postholder; the focus here is on *the what.*

The associated **person specification** details the competencies – understood as the knowledge, skills, attitudes, and experience - that lead to the successful execution of the job's critical responsibilities and accountabilities outlined in the job description; the focus here is on *the how.*

Benefits of using the Professional Map to support role design

- ✓ Ensures that the competencies included are based on a market-led standard
- ✓ Ensures consistency in the language used across all job descriptions
- ✓ Helps managers identify competencies that may have not been considered otherwise
- ✓ Provides clarity to the candidate on the behavioural performance expectations needed to succeed in the role
- ✓ Provides clarity to the candidate on what competencies they may want to develop to progress within the role or to move into other roles
- ✓ Supports benchmarking the role to establish remuneration

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Before you start

Before you start, ensure there is a business case to evidence the need for the role. If the vacancy is a replacement, ask yourself whether the current job description is up to date and if not, use this opportunity to review it following the steps below.

1 Set out the job purpose

Determine what the role is required to do by looking at the current objectives and goals of the organisation and how this role will support them. Ask yourself:

- What is the main purpose of the role?
- Where does this role fit within the organisation?
- What isn't being done now that this role can fulfil?
- What does the employee need to take ownership for?

Summarise the answers in a concise and easy to read but defined enough way so that the candidate understands what the job fully involves.

2 Identify the band against which you will map the role

The Professional Map is structured into 4 bands of experience, each describing the different level of impact professionals have in the work they do.

If you were recruiting for a Claims Manager role whose purpose is to oversee the processing of complex claims, you will likely map the role against band 3 competency standards. Read the behaviours, enablers and technical expertise (where relevant) at the band identified, but also explore whether there are standards within different bands that would also be critical, as roles will not always fall perfectly within a specific band.

4 Identify the competency standards that will inform the job description

The job description sets out the critical responsibilities and accountabilities of the role, stemming from the purpose you have described in step 1.

Drawing on the Technical Expertise area you have identified in step 3, identify the competency standards that will be critical in supporting the role's purpose and develop the job description from here.

For example, for the Claims Manager role, you will refer to the Technical Expertise area of Claims. This is how you might take a competency standard and develop it into content for the job description:

"I review, assess and evaluate complex insurance claims" (from Technical Expertise: Claims Band 3) could become: Responsible for handling an extensive caseload of complex claims.

3 Identify the technical area that is relevant to the role

The Professional Map includes four areas of Technical Expertise that describe function specific competency standards across 4 bands. These areas are:

- Underwriting
- Broking
- Claims
- Protection Advice
- Financial advice and planning
- Paraplanning
- Mortgage broking
- Supporting functions

Technical Expertise standards focus on the technical knowledge and practice, i.e. what practitioners do and deliver in their roles, which can be used to inform the job description.

If the role you are recruiting for is not currently reflected within the Professional Map, you can still use the enablers and behaviours, as these are non-function specific, i.e. they are deemed universally applicable to all roles.

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5 · Identify the standards that will inform the person specification

The person specification sets out the level of knowledge, skills, attitudes, and experience required to deliver the responsibilities and accountabilities laid out in the job description.

You will find these mostly within the Behaviours and Enablers. From here identify the standards that will be critical for the candidate to deliver on the job and develop the person specification from here.

> For example, this is how you might take some standards and develop them into content for the person specification:
>
> - "I explore the causes of problems, using analysis of patterns and trends, and consider future possibilities before taking action" (from the Behaviour: Insight) could become: Experience of how to use analytical methods and insights to prioritise improvement
>
> - "I support and drive innovation, disruptive thinking, and new initiatives" (from the Behaviour: Curiosity) could become: Evidence of a proactive approach to delivering new initiatives

6 · Review

Step back and look at the document in its entirety to make sure that the job holder would have a clear understanding of the expectations of the role and how it fits within the organisation.

> The CII encourages all practitioners to develop themselves across all behaviours, enablers, and technical expertise competencies relevant to their role – even if they are not outlined in a job description or person specification – to ensure they are future-fit and the best professionals they can be.

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