

SAMPLE COMPETENCY BENCHMARKS FOR ACCOUNTANTS

	STAFF	IN-CHARGE/ SENIOR	MANAGER	SENIOR MANAGER
PROFESSIONAL KNOWLEDGE	Reads and interprets financial statements; performs specific accounting tasks as delegated	Demonstrates solid judgment when interpreting data; Helps staff to develop professional acumen	Stays current on regulatory and industry changes affecting clients	Develops expertise in a particular industry or service area; Identifies ways to share knowledge firm-wide
TECHNICAL SKILLS	Demonstrates proficiency in Microsoft Office suite of products; Demonstrates facility with firm-specific/ industry-specific software	Demonstrates proficiency in use of firm-specific/industry-specific software; trains others on software applications	Identifies ways to manipulate technical software to meet client needs	Identifies ways to manipulate technical software to develop client services; Shares technical “best practices” firm-wide
CLIENT RELATIONS	Responds quickly to client inquiries and demands; Builds relationships with peers at client sites; Forms community/ association alliances	Serves as the primary client contact on engagements; Identifies ways to provide additional and better service to clients; Reads client industry publications	Guarantees client satisfaction; Takes a leadership role in professional/ community organizations; Identifies and sells client service opportunities	Speaks frequently at conferences and writes articles for trade publications; Meets or exceeds firm-established threshold for revenue generation; Develops the client service skills of team

	STAFF	IN-CHARGE/ SENIOR	MANAGER	SENIOR MANAGER
COMMUNICATION SKILLS	Writes concisely and coherently; Prepares and assists in the delivery of both internal and client presentations; Demonstrates confidence and assertiveness when interacting with clients, colleagues and supervisors	Writes concisely and persuasively and provides constructive feedback on staff writing; Speaks confidently and knowledgeably when presenting to clients, colleagues and supervisors	Reviews and develops writing and speaking skills of staff; Diffuses conflict and confrontation and develops a high-performing team of staff people; Speaks confidently and persuasively to the client	Identifies overall strengths and weaknesses of team communication skills and recommends individual and collective improvement plans; Serves as a model for effective writing, speaking and interpersonal communication
MANAGEMENT SKILLS	Manages time and tasks appropriately; asks for clarification on assignments as necessary; understands where a specific task fits into the larger client deliverable	Delegates tasks appropriately; explains purpose and goal of each task to staff; Manages staff and client expectations	Assumes overall project management responsibility, including staffing, billing and client satisfaction	Develops the management and supervisory skills of the team; Ensures overall quality of work product, including efficient allocation of billable time and resources
LEADERSHIP ABILITY	Seeks learning opportunities; Assumes responsibility for tasks that challenge current level of skill and ability; Takes calculated risks	Determines personal career path at the firm; Provides effective coaching and timely feedback to develop staff	Recognizes talents and weaknesses of staff and intervenes with constructive feedback and action plans as appropriate	Serves as a role model for leading a successful engagement team; Monitors both formal and informal performance feedback processes to ensure effective staff development