

PROGRAM GUIDE

COMPETENCY ASSESSMENTS

***GAIN THE ORGANIZATIONAL INTELLIGENCE THAT REVEALS WHERE
CAPABILITY GAPS ARE BLOCKING GROWTH***

EXECUTIVE SUMMARY

Built on more than 20 years of benchmark research, BAI's competency assessments reveal organizational capability patterns that drive or block execution. We measure what people understand about the business and how effectively they apply that knowledge, segmented by role, level, business unit, product line, or heritage company.

THE GROWTH CAPABILITY PROBLEM

Growth strategies fail not because the strategy is wrong, but because organizations lack the capability to execute. Leaders see the symptoms:

- Strategy gets lost between organizational levels
- Cross-functional coordination breaks down
- Product launches consistently miss the mark
- Business cases lack sufficient market context and financial rigor
- Some business units execute cleanly while others struggle
- Resources pour into training with no measurable impact

The root cause? Capability gaps no one has measured. Why? Because traditional assessments don't solve this. Behavioral assessments measure personality. Skills checklists are too generic. Individual development plans don't reveal organizational patterns.

You need capability intelligence: Where does capability break down across your organization? Which gaps are blocking growth? Do acquired companies think about the business the same way you do? Are high-potential leaders truly ready?

WHAT WE MEASURE (Not personality. Not Potential. Capability)

We measure what people understand about the business and how effectively they apply that knowledge in real situations. Then, we segment results by dimensions that impact or stand in the way of execution. These segments may include:

- Role and level where capability might break down, especially as responsibility increases
- Business unit or division so that areas ready for growth are more easily identified
- Product line or product group, providing insights that correlate skills, competencies, and capabilities to product and portfolio performance
- Functional groups that can reveal capability gaps that create organizational drag
- Geographic groups that might reveal capability patterns in global organizations

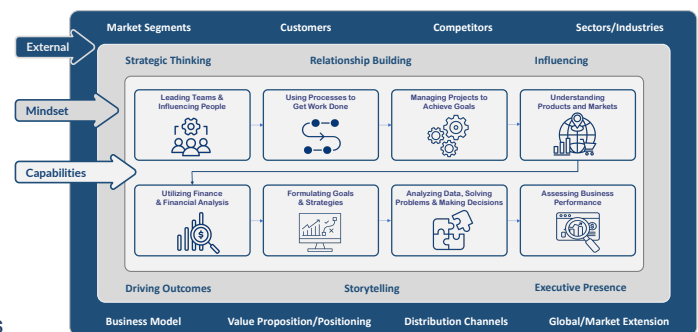
This segmentation reveals organizational patterns that individual scores cannot. You see where strategy is getting lost, where coordination friction lives, and where targeted training and development will have the greatest impact on execution.

TWO ASSESSMENTS

BUSINESS ACUMEN COMPETENCY ASSESSMENT. For product managers, emerging leaders and cross-functional contributors who need stronger foundations to execute strategy effectively. It measures capability across ten critical dimensions, based on The Business Acumen Canvas

What it builds: strategic thinking

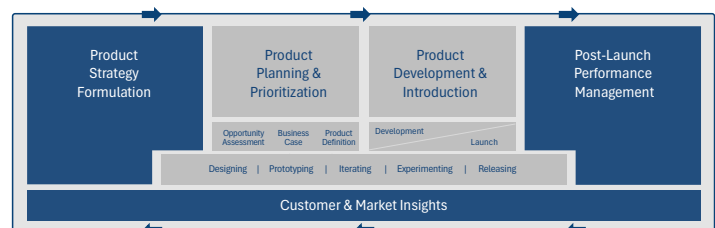
1. External factors & market orientation
2. Mindset and strategic thinking
3. Leading teams and influencing people
4. Using processes to get work done
5. Managing projects to achieve goals
6. Understanding markets and products
7. Utilizing finance and financial analysis
8. Formulating goals and strategies
9. Analyzing data, solving problems, and making decisions
10. Assessing business performance



Business Acumen Canvas

PRODUCT MANAGEMENT COMPETENCY ASSESSMENT. For product managers and cross-functional product team members. Based on The Product Management Life Cycle Model

1. Understanding customers and customer segments
2. Assessing the industry and competition
3. Formulating product strategies and roadmaps
4. Product planning and prioritization
5. Product design and validation
6. Oversight of product development
7. Launch and commercialization
8. Product pricing (assessment of value delivered)
9. Product promotion and customer education
10. Sales, channel, and distribution performance
11. Post-launch performance management
12. Cross-functional team leadership

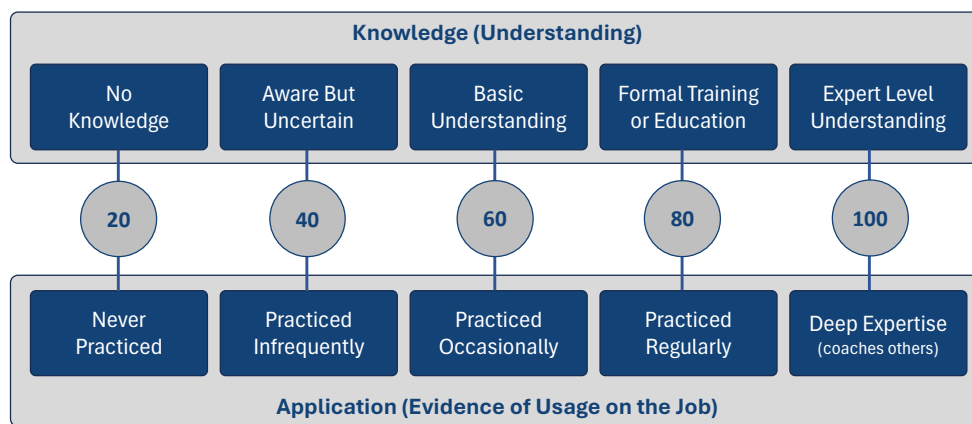


Product Management Life Cycle Model

THE DUAL-PERSPECTIVE RATING SCALE

Most assessments utilize a simple, single Likert scale and just measure knowledge, which is subjective and open to bias. BAI's competency assessments use two rating scales per item: **knowledge and application**, or what people understand to be true, and the evidence to support how they use what they know to effectively do their jobs. The gap between these ratings creates each *Capability Gap Signature* for a given segment or population in an organization; a pattern that reveals whether people:

- Know the theory but struggle with execution
- Act intuitively but lack structured knowledge
- Operate with both strong understanding and application
- Have gaps in both areas requiring foundational development



Competency Assessment Dual Rating Scales

When aggregated across your organization and segmented by role or business unit or other parameters, these patterns show exactly where development will reduce drag and accelerate results.

ORGANIZATIONAL SEGMENTATION: WHERE THE INSIGHTS LIVE

While individual scores matter, organizational patterns matter more. Here's how this might appear.

- *When segmented by level*, we may find that VPs understand strategy, but mid-level managers can't translate it to daily decisions, so strategic intent is lost between levels. This may indicate a transparency, communication, or culture problem.
- *When segmented by business unit or division*, we may see higher scores on financial discipline and strategy formulation in one business unit where teams execute well. Alternatively, another business unit might struggle due to a lack of core competencies in finance and strategy or a lack of customer understanding.
- *When segmented by product line*, we may find that areas with strong market presence and an ongoing influx of orders (this seems good). But this may cause people to be reactive and tactical, dealing with needs of the moment. Product people may struggle with blind spots where a competitor may do something unexpected, or a product's functionality no longer meets a specific market need.

CONNECTION TO THE GROWTH CAPABILITY ASSESSMENT

These competency assessments work alongside BAI's Growth Capability Assessment to provide a holistic picture and an extraordinary level of organizational intelligence (go to: business-acumen.com/growth-accelerator/)

- Growth Capability Assessment = The organizational X-ray (WHERE the problems are)
- Competency Assessments = The capability MRI (WHO needs development and in WHAT areas)

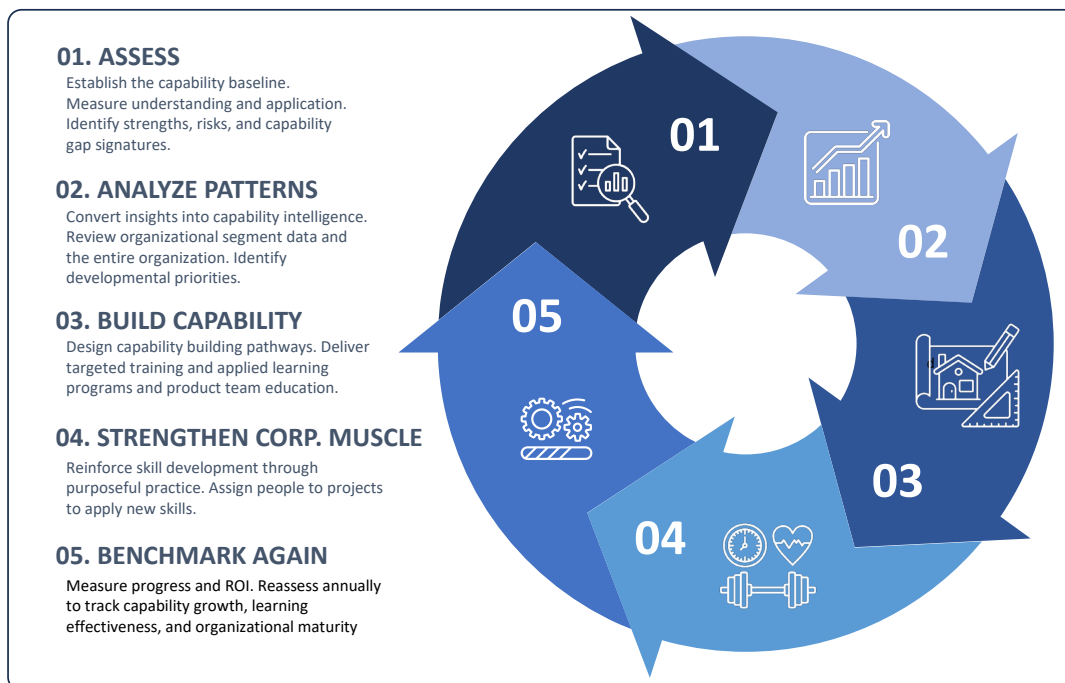
This dual-diagnostic approach eliminates guesswork. You know exactly where to intervene, with whom, and why it matters to growth. Please refer to the comparison table below.

Growth Capability Assessment	Competency Assessments
What it measures: • Organizational systems, processes, and structural capability • WHERE organizational drag exists	What it measures: • Individual or team capability to interpret strategic intent and to execute • WHO has the capability gaps that create drag
Focus areas (sample): • Strategic clarity and alignment • Decision velocity and quality • Cross-functional communication • Resource allocation effectiveness • Anticipation of market activity • Cultural paradigms • Execution discipline • Operations	Focus areas (sample): • Business and market understanding • Interpretation of strategic intent • Cross-functional alignment • Data orientation • Analytic capacity • Communication • Leadership potential • Process usage
Primary questions answered: • Where is drag in our organization • What structural barriers block execution? • Why aren't initiatives producing desired results? • Where should we intervene first?	Primary questions answered: • Which people and teams have capability gaps? • Where does understanding break down? • Can leaders apply what they know? • Who's ready for broader responsibility? • Why do some areas perform better than others?
Assessment level and respondents: • Higher-level executives / C-Suite (5-20 people)	Assessment level and respondents: • Individual contributors, managers, and senior managers (10-500 people)
Time needed to complete: 20-30 minutes	Time needed to complete: 25-35 minutes
Rating scales: Performance vs. Importance	Rating scales: Knowledge vs. application
Primary output: • Gap analysis with preliminary prioritization and suggested intervention scheme (also input to a leader-level workshop). • Used to plan rapid-cycle capability improvement projects	Primary output: • Gap analysis and capability profile by role, level, unit (agreed-upon with clients) • Capability gap signatures • Areas on which to focus remedial support (training, projects, coaching)

WHO USES THIS ASSESSMENT AND WHY

- **CEOs and C-Suite Leaders** who want to assess the organization's readiness for growth and make evidence-based succession decisions
- **Human Resource/Learning & Development/Talent Development Leaders** who want to focus on L&D investments that can accelerate growth, improve competency levels, manage succession plans, and build leadership pipelines. Longitudinal assessments (spaced a year apart) contribute to better ROI calculations on training investments.
- **Product and Innovation Leaders** who need to understand the capability and impact of the product management organization. May lead to an understanding of why some product lines are more successful than others. Can also influence hiring decisions and succession plans.

THE CAPABILITY OPTIMIZATION CYCLE



This cycle drives capability optimization and equips your workforce to execute strategy with clarity and confidence.

WHAT YOU RECEIVE: Comprehensive Organizational Intelligence

Just like any strategic planning process, you need to collect data and form a baseline that examines where you've been and where you are. When your company is engaged with our competency assessments (and even better, with our growth capability assessment), you have a solid baseline from which you can plan and prioritize your next steps. Because of the rapid turnaround in our analysis and reporting, you'll have the intelligence you need, at the speed you need with budget-friendly pricing. Here are some of the items:

- **Organizational segment profiles** - Understanding vs. Application across all dimensions
- **Heat maps and pattern analysis** - Strength and gap patterns by role, level, business unit
- **Segmented reports** - Capability data cut by the dimensions that matter to your business
- **Capability Gap Signatures** - Where development will have greatest impact
- **Prioritized recommendations** - Targeted capability building pathways
- **Connection to Growth Capability data** - Complete organizational intelligence – especially if you establish a Growth Capability Office

Annual Benchmarking Option: Track capability growth year over year. Measure ROI on development investments. Ensure you're building the corporate muscle your strategy requires.

WHAT YOU CAN DO

Whether you want to use these competency assessments to fortify learning and development goals, tighten up your talent strategy, or direct resources to the most impactful initiatives, you'll be able to approach organizational development with the agility of a vibrant competitor.

These assessments don't end with a report. They're the **diagnostic foundation for your Growth Capability Office, should you decide to establish one**. This is the foundational data that helps you focus on training that matters, or what guides 90-day rapid-cycle work projects that can reduce drag, build muscle, and accelerate growth. Instead of year-long training programs that produce no measurable business impact, you get targeted capability interventions that can help you focus on near-term results, sometimes in 90 days or less, especially when these competency assessments are carried out with our Growth Capability Assessments (for senior executives).

This is how assessment data becomes growth capability - the organizational muscle your strategy requires.

READY TO GET STARTED? Book a Discovery Call: Schedule 30 minutes to discuss your specific challenges and how we might contribute to the accelerated growth your company needs to compete.

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