



Accountancy SJT

A candidate report for:

Sam Sample

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Introduction

This report is confidential and is intended to provide you with feedback on your results. The Accountancy SJT is designed to assess behaviours linked to success in the role of an Apprentice Accountant, Trainee Accountant, & newly Qualified Accountant. The competencies assessed are defined below.

Accountancy Competencies

Purposeful Engagement Supporting colleagues, fee-earners, & clients in an effort to improve and maximise outcomes (i.e., efficiency & quality).

1. Building trust & confidence with colleagues, fee-earners, & clients through personal engagement and support
2. Establishing a network of fluent relationships with colleagues, fee-earners, & clients
3. Communicating clearly and confidently (i.e., being clear, precise & timely)
4. Negotiate fluently and calmly, esp. with colleagues, fee-earners, & clients

Creating Clarity: Establishing a clear, precise & accurate understanding of situations & tasks to facilitate effective action and valid decision-making.

1. Understanding the company (i.e., culture, priorities, procedures, etc)
2. Understanding own (and others') strengths & limitations, as well as perspectives and attitudes
3. Gathering sufficient information to establish a clear understanding of tasks & priorities
4. Analysing situations (i.e., risks, benefits, & opportunities) appropriately to draw valid conclusions & make appropriate decisions

Driving Peak Performance: Routinely delivering a high quality, efficient & adaptive client-focused service (i.e., colleagues, fee-earners, & clients).

1. Setting clear & achievable targets for self (& others), monitoring progress & adapting as required
2. Being proactive at all times, in dealing with responsibilities & challenges, esp. delays, quality & tasks
3. Being resilient, having effective strategies for dealing with work-related pressures & setbacks
4. Maintaining an organised & calm approach, esp. under pressure & managing deadlines

Professional Credibility: Demonstrating a genuine commitment to company standards and best practice.

1. Demonstrating genuine, visible commitment to company values, goals & priorities
2. Demonstrating appropriate care and attention in all aspects of work (e.g., due diligence, quality, process, etc)
3. Being open & honest about own strengths & development needs (i.e., acknowledging own limitations, errors, & misjudgements, etc.)
4. Welcoming & providing constructive challenge, recognising the need to keep learning

How To Use This Report

This report provides you with feedback from the Accountancy SJT. It contains 'behavioural interpretation' that you can use to help you understand how you have performed on the exercise and 'development opportunities' to inform your development priorities, should you wish to improve your skills in specific areas.

Behavioural Interpretation






For each competency, an interpretation (four bullet points) has been provided to help you better understand the decisions you made on the exercise. Not every bullet point may apply equally to you, but you should consider them all, at least initially, and then decide which are most relevant for you.

Development Opportunities

You have also been provided with some ideas to help improve the competencies. The suggestions are intended to support you in your career progression, so working through these suggestions and identifying your own ideas for improving your skills should help you create a relevant development plan. When creating your development plan, it is best to set SMART Goals:

- **S = Specific:** Clearly defined and unambiguous
- **M = Measurable:** Contains specific criteria that you can use to measure your progress and goal accomplishment
- **A = Achievable:** Attainable in the timeframe you have set yourself and not impossible to achieve
- **R = Relevant:** Relevant to your goal, career or what you want to achieve
- **T = Time-bound:** Has a clear start and end date

The SMART Template below can be used to help you set a development goal.

 S	<p>Specific</p> <ul style="list-style-type: none"> • What do I want to achieve? • When do I need to achieve it? • Why is the goal important? • Who is involved? 	
 M	<p>Measurable</p> <ul style="list-style-type: none"> • How will I measure my progress? • How will I know when my goal is achieved? • What will be different when I have completed my goal? 	
 A	<p>Achievable</p> <ul style="list-style-type: none"> • Can I complete my goal in the time I have available? • How confident am I that I can achieve my goal? • What support will I need to achieve my goal? 	
 R	<p>Relevant</p> <ul style="list-style-type: none"> • Why is this goal important to me? • How does this goal relate to my overall success? • What is especially meaningful about my goal? 	
 T	<p>Time-bound</p> <ul style="list-style-type: none"> • When will I be ready to start working on my goal? • What specific date will I complete my goal? • How often will I check the progress I am making on my goal? 	

Feedback

Purposeful Engagement

Your responses suggest that you:

- Engage with colleagues to build confidence and align on expectations
- Promptly engage others, seeking opportunities to build fluent working relationships
- Communicate clearly and constructively with colleagues & clients to manage expectations
- Constructively negotiate with others to explore and agree on how best to meet their expectations

Development Opportunities

To develop your skills further in this area you might wish to consider:

- Review your client relationships and identify any you could benefit from improving
- Role model to your colleagues how to build strong client and partner relationships
- Offer to mentor some of your colleagues to improve their communication skills
- Create a list on the techniques that have helped you the most in negotiating with clients & senior colleagues

Driving Peak Performance

Your responses suggest that you:

- Carefully prioritise activity and formulate plans to ensure efficient delivery of tasks
- Quickly take full ownership of challenging assignments, managing tasks carefully
- Are highly resilient, thinking clearly and carefully about the best course of action, after making a mistake
- Effectively manage your workload, carefully articulating what can be achieved with limited resources or time

Development Opportunities

You might usefully stretch your skills further in this area by:

- Evaluating your goals to ensure they are all Specific, Measurable, Achievable, Relevant and Time-bound
- Role modelling the importance of clearly taking ownership for problems that impact internal efficiency and/or client satisfaction
- Making a list of the most challenging aspects of your role and consider how you can improve your performance & well-being in these areas
- Coaching and supporting one of your colleagues with their Time Management skills

Professional Credibility

Your responses suggest that you:

- Are open and supportive of others, investing your time to help others find solutions to challenges
- Are diligent, demonstrating appropriate care and attention to ensure complete your work to a very high standard
- Clearly acknowledge your own misjudgements or mistakes, ensuring errors can be fully resolved
- Welcome opportunities to learn & develop, seeing feedback as an opportunity to improve

Development Opportunities

To develop your skills further in this area you might wish to consider:

- Role modelling the importance of supporting each other and collaborating
- Reviewing some of your recent work to establish where you could make improvements
- Sharing some of your past mistakes and vulnerabilities with your colleagues to encourage them to similarly open up about their problems
- Using a 360-degree feedback tool to gather positive & constructive feedback from your colleagues

Creating Clarity

Your responses suggest that you:

- Seek to understand the broader aims of the company, prioritising work in line with these expectations
- Consider the perspectives of others before making difficult people decisions
- Gather a sufficient amount of information before making important decisions
- Establish how to resolve challenging or complex problems

Development Opportunities

To develop your skills further in this area you might wish to consider:

- Facilitating a discussion about the culture and wider priorities of your firm, and then consider how this might usefully influence your priorities
- Having conversations with a wider range of business stakeholders to explore their perspectives before making decisions or implementing new solutions
- Obtaining new information by having regular team discussions when complex decisions needs to be made
- Encouraging yourself to rethink decisions when new information arises

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