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### Set up your HR Department

A complete HR Toolkit for small business to create and maintain your HR fundamentals.

#### Create your HR materials

- 260+ premium templates to create contracts, employee manuals, forms, spreadsheets and manager guides
- Download your HR folders
- Identify your HR priorities
- 22 HR topics
- Create HR intranet

#### Support your HR Function

- COVID-19 Portal
- Legislation Portal
- Remote Workforce Portal
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- Weekly updates, email notifications
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## About This Document

owner	HR
access & use	All Staff
what it is	<p>A list of success traits. Used by HR, Managers, and other Staff for writing job descriptions, creating job postings, and conducting performance reviews. Categories include:</p> <ul style="list-style-type: none"> <li>♦ Core Company Success Traits expected of all employees</li> <li>♦ Individual and interpersonal traits</li> <li>♦ Analytical competencies</li> <li>♦ Motivational and aptitude competencies</li> <li>♦ Leadership competencies</li> </ul>
who uses it	All Staff
used with	<ul style="list-style-type: none"> <li>♦ <i>JE-ALL-3530-M. Job Description Form</i></li> <li>♦ <i>OP-ALL-2450-M. Job Posting - Standard</i></li> <li>♦ <i>PP-MGR-3110-M. Probationary Period Review Form</i></li> <li>♦ <i>PR-MGR-3170-M. Annual Performance Review Form</i></li> </ul>

## Introduction

Success traits are the observable and measurable behaviors or abilities that must be demonstrated by employees to be successful in their jobs.

Success traits are not the same as technical skills or experience. Technical skills are the skills you need to execute on the tasks of your position, and experience is the length of time you have used those skills in practice. Technical skills describe ‘what’ you do, whereas success traits describe ‘how’ you do it.

At **CUSTOMIZER: Insert Company Name**, we have **Core Company Success Traits** – against which everyone is measured – and **position-level success traits**, which are the traits needed to be successful in a specific position. These traits receive significant weighting in hiring decisions, performance reviews, and rewards given.

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- ◆ Takes calculated risks.
- ◆ Provides constructive feedback.
- ◆ Takes negative action when required.
- ◆ Proactively deals with people problems.
- ◆ Proceeds with well-thought-out action that is best for the Company, despite the risk of conflict, resistance, or not being popular.
- ◆ Makes well-considered, wise, and brave decisions to proceed constructively, despite fear, discomfort, or temptation.
- ◆ Accepts that one is not always right.

## **7. Intellectual Horsepower**

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- ◆ Deals comfortably with complexity and new concepts.
- ◆ Quickly learns and assimilates complex information involving unfamiliar situations and circumstances.
- ◆ Analyzes, explains, and draws logical conclusions based on complex data from multiple sources.
- ◆ Quickly perceives implications and makes sound decisions.
- ◆ Demonstrates strong critical thinking skills.
- ◆ Cuts through non-essential, illogical, over-generalized, or unsubstantiated information.

## **8. Self-Confidence**

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- ◆ Demonstrates a belief in one's own abilities, competence, judgment, decisions, and opinions.
- ◆ Within boundaries of authority, works and takes action without needing supervision.
- ◆ Speaks up confidently and respectfully to voice an opinion or take a stand on critical issues.
- ◆ Seeks challenging assignments and new responsibilities.
- ◆ Perseveres to the finish line, even in the face of resistance, set back, or failure.
- ◆ Admits when doesn't know something.

## **9. Reflection**

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- ◆ Takes responsibility for contribution to an unsuccessful outcome.
- ◆ Explains failures or negative events without blame.
- ◆ Re-energizes after a setback and readdresses the situation to overcome it.

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- ♦ Engages in responsible dialogue and brainstorming to develop new ideas and unique solutions to problems.
- ♦ Continuously seeks ways to improve all aspects of the Company and communicates suggestions.

## **14. Planning / Organization Skills / Time Management**

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- ♦ Establishes a realistic and systematic course of action for self and others to accomplish a specific goal.
- ♦ Sets the right priorities.
- ♦ Utilizes planning and/or time management tools.
- ♦ Monitors progress and makes necessary corrections.
- ♦ Controls interruptions.
- ♦ Accomplishes work in a timely manner.

## **Analytical Success Traits**

The elements of decision making.

## **15. Critical Thinking**

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- ♦ Uses methods of logical inquiry and reasoning.
- ♦ Recognizes the existence (or non-existence) of logical relationships in work.
- ♦ Tests conclusions and generalizations.
- ♦ Applies logical reasoning and considers why status quo or suggested solution won't work.
- ♦ Looks forward to understand the consequences of a situation.
- ♦ Makes connections between information and arguments.
- ♦ Analyzes how parts of a whole interact to produce outcomes in complex systems.

## **16. Problem Solving**

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- ♦ Assesses challenges to identify causes.
- ♦ Gathers and processes relevant information.
- ♦ Generates creative solutions and finds a way to make it work.
- ♦ Makes recommendations and/or resolves the situation.

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- ♦ Possesses a strong ability to focus on tasks and priorities amidst continuous distractions.

## Interpersonal Success Traits

Dealing with others.

### 21. Composure / Emotional Maturity

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- ♦ Maintains composure when provoked, under intense pressure, or faced with multiple priorities.
- ♦ Restrains emotional impulses and responds calmly.
- ♦ Calms others.
- ♦ Demonstrates the ability to maintain stamina under stress.
- ♦ Understands how one's actions affect others.
- ♦ Knows when it's time to leave the room.

### 22. Interpersonal Skills

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- ♦ Effortlessly builds and maintains productive, cooperative relationships with internal and external stakeholders.
- ♦ Demonstrates a strong ability to quickly connect with others, particularly during uncomfortable or stressful situations (such as during the interviewing process).
- ♦ Demonstrates a high Emotional Quotient (EQ) and the ability to read people.
- ♦ Uses tact and diplomacy while still challenging the status quo.

### 23. Diversity

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- ♦ Promotes an environment that supports diversity.
- ♦ Values differences in people, ideas, and cultures.
- ♦ Deters workforce bias or discrimination.
- ♦ Encourages fair treatment of all team members.

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- ♦ Is tenacious, persistent, and resourceful.
- ♦ Translates ideas into action and execution.
- ♦ Understands how to get work done through others.
- ♦ Demonstrates discipline when exposed to distractions.

## **28. Initiative**

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- ♦ Looks for and takes action to make a contribution to the Company rather than being asked or passively accepting situations.
- ♦ Does more than is required. Digs deep and questions the process.
- ♦ Offers new ways of working or solving problems over and above what is expected.
- ♦ Looks for and takes opportunities for development and to improve performance.
- ♦ Anticipates future opportunities and challenges.
- ♦ Seeks out additional responsibilities and learning opportunities.

## **29. Continuous Learning**

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- ♦ Demonstrates desire and drive to acquire knowledge and skills necessary to perform job more effectively.
- ♦ Takes responsibility for one's own development.
- ♦ Stays up to date on relevant trends, industry, technology, tools, and best practices.
- ♦ Continuously looks for ways to connect with subject matter experts and networks to expand job capabilities.

## **30. Customer Focus**

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- ♦ Considers internal and external service stakeholders as 'customers'.
- ♦ Develops and maintains strong relationships with customers.
- ♦ Focuses efforts on discovering and meeting customer needs.
- ♦ Demonstrates a strong commitment to 'client first' and 'do what it takes' approaches to providing products, services, and support.
- ♦ Looks for ways to improve service.
- ♦ Takes personal responsibility for ensuring satisfaction.

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### 34. Presentation / Public Speaking Skills

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- ◆ Presents in a confident, clear, and passionate manner when addressing people in a large or small group.
- ◆ Is influential and knowledgeable on the subject matter presented.
- ◆ Knows how to use appropriate audio-visual media.
- ◆ Understands and adapts to the communication levels required by varied audience.

### 35. Negotiation

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- ◆ Skillfully explores positions and alternatives to reach outcomes that are accepted by all parties.

## Managerial Success Traits

Working through others to get work done. Applicable to positions that manage direct reports or teams.

*You may use 'Staff Management' as a competency that summarizes general staff management skills instead of listing skills individually. This leaves room for other competencies used for the job description, job posting, or performance review form.*

### 36. Staff Management

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- ◆ Hires, motivates, develops, and manages performance of a diverse workforce, in line with Company values and goals.
- ◆ Ensures high performers are retained.
- ◆ Motivates, coaches, and develops staff to ensure the best results.
- ◆ Manages performance and non-performance.
- ◆ Supports diversity and encourages innovation.
- ◆ Delegates effectively.
- ◆ Resolves conflict.
- ◆ Provides a work environment conducive to achievement and growth.
- ◆ Manages budgets, resources, and projects.
- ◆ Celebrates and rewards success.

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- ◆ Provides support without removing responsibility.
- ◆ Helps others to solve problems rather than providing them with the answers.

#### **41. Follow Up**

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- ◆ Establishes protocols to monitor the activities and results of delegations, assignments, or projects.
- ◆ Collects and reviews reports outlining activities, progress, and results.
- ◆ Schedules staff meetings to share information and review progress and challenges.
- ◆ Meets with individuals regularly to discuss assignment status.
- ◆ Provides feedback and improvement plan if necessary.

#### **42. Performance Management**

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- ◆ Sets clear performance standards and objectives.
- ◆ Monitors and measures performance.
- ◆ Coaches and develops the capacity for staff to perform.
- ◆ Conducts performance reviews.
- ◆ When necessary, demonstrates the ability to make difficult staffing decisions and/or implements performance improvement plans.
- ◆ Recognizes, celebrates, and rewards successes.

#### **43. Managing Work**

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- ◆ Establishes a course of action for others to accomplish specific goals.
- ◆ Communicates objectives and goals.
- ◆ Plans assignments, staffing, and resources.
- ◆ Identifies priorities, critical paths, and deadlines.
- ◆ Schedules meetings, projects, and tasks.
- ◆ Establishes process and procedures.
- ◆ Coordinates and adjusts work plans.
- ◆ Uses planning, tracking, or time management tools.
- ◆ Develops and/or adheres to budget.

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- ♦ Accepts responsibility for own decisions and actions and for those of the group, team, or department.
- ♦ Endeavors to learn from mistakes.

## **47. Financial Management**

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- ♦ Understands the Company is in business to make a profit.
- ♦ Uses quantitative information to monitor operations and make strategically-based decisions.
- ♦ Establishes and adheres to realistic budgets and analyzes variances for immediate action.
- ♦ Demonstrates fiscal responsibility and gets the best value and return on investment for the Company.
- ♦ Spends funds on initiatives that are the most strategically aligned with, and provide the strongest business case for the Company.
- ♦ Adheres to headcount and workforce ceilings.
- ♦ Makes and supports decisions in line with the Company's financial health, including adjusting resource levels.

## **48. Strategic Focus**

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- ♦ Generates and applies alternative and viable strategies or business models to create competitive advantages for the Company.
- ♦ Finds ways to capitalize on opportunities and provide customer value.
- ♦ Thinks holistically and futuristically.
- ♦ Constantly scans internal and external environments.
- ♦ Acts as an explorer, with heightened curiosity and alertness.
- ♦ Demonstrates a strong desire to outwit and beat the competition.
- ♦ Keeps an open mind to new ideas and diverse perspectives.
- ♦ Displays expertise in areas of specialization and environmental trends.
- ♦ Balances risks and rewards.

## **49. Influence / Persuasiveness**

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- ♦ Influences and persuades others to gain agreement or acceptance of an idea, plan, activity, or product.

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