

# “Clear” Communicator

Definitions	Foundational <i>Clear, thoughtful, and articulate communications</i>	Advanced <i>Tactful and tailored communications for diverse audiences</i>	Mastery <i>Strategic communications and cross-functional facilitation expertise</i>
<p>Key elements:</p> <ul style="list-style-type: none"> <li>• <b>Timely Communication:</b> Shares important information with others promptly to enable effective decision-making and execution.</li> <li>• <b>Active Listening:</b> Listens carefully to others, asks questions to clarify understanding, and summarizes main points.</li> <li>• <b>Effective Messaging:</b> Provides context, identifies key messages, and communicates them at the appropriate level of detail.</li> <li>• <b>Information Dissemination:</b> Distills complex issues and disseminates information to influence outcomes and is sought after for comprehensive information.</li> <li>• <b>Audience Adaptation:</b> Adapts communication style to fit the audience's background, knowledge, and understanding.</li> <li>• <b>Confidence and Credibility:</b> Conveys a strong sense of authority and credibility in interactions with others.</li> </ul>	<ul style="list-style-type: none"> <li>• Ensures that important information is consistently shared with managers, peers and business partners in a timely manner to enable effective decision-making and/or execution.</li> <li>• Observes and listens for main points in communications from others, suspending bias and asking clarifying questions and/or summarizing to confirm understanding.</li> </ul>	<ul style="list-style-type: none"> <li>• Provides context and identifies and articulates key messages effectively and at the appropriate level of detail.</li> <li>• Distills complex issues to simple terms. Drives information dissemination up and down the organization to influence appropriate outcomes. Sought by others to provide accurate and comprehensive information.</li> <li>• Adapts communication style based on their audience. Considers the listener's background, knowledge, and level of understanding to communicate in a way that is easily understood by the listener.</li> </ul>	<ul style="list-style-type: none"> <li>• Exude confidence and self-assuredness, conveying a strong sense of authority and credibility in their interactions with others.</li> <li>• Clearly communicates sensitive and difficult information using the appropriate communication style for the audience. Exceptional meeting facilitator, promoting effective decision making and mutual understanding among cross-functional and/or executive level participants.</li> </ul>

# “Thoughtful” Problem Solving and Decision Making

Definitions	<b>Foundational</b> <i>Using logic, demonstrating resourcefulness and completeness in approach</i>	<b>Advanced</b> <i>Developing innovative solutions, exploring alternatives, considering organizational impacts, and demonstrating decisiveness</i>	<b>Mastery</b> <i>Creates culture of bringing rigorous and thorough analysis and creativity to solutions; sees organizational impacts, coaches others</i>
<p>Key elements:</p> <ul style="list-style-type: none"> <li>• <b>Issue Recognition:</b> Identifying and articulating urgent issues</li> <li>• <b>Problem-Solving:</b> Identifying methods and approaches to address constraints and make decisions</li> <li>• <b>Stakeholder Management:</b> Identifying key stakeholders, explaining solutions, and obtaining approval before taking action</li> <li>• <b>Questioning:</b> Asking penetrating questions to define the problem accurately</li> <li>• <b>Collaboration:</b> Engaging key stakeholders in solution development and understanding the impact</li> <li>• <b>Resourcefulness:</b> Seeking out, defining, and evaluating possible solutions using available resources</li> <li>• <b>Coaching:</b> Coaching and training team members on analytical methods for problem-solving</li> <li>• <b>Decision Making:</b> Clarifying appropriate venues and individuals for decision-making throughout the process.</li> </ul>	<ul style="list-style-type: none"> <li>• Demonstrates ability to recognize, understand and articulate issues that arise, including the degree of urgency in addressing them.</li> <li>• Understands requirements and identifies methods or approaches for dealing with constraints to solving the problem or making a decision.</li> <li>• Identifies key stakeholders, explains issues/solutions, elicits feedback, and obtains support and approval before taking action.</li> </ul>	<ul style="list-style-type: none"> <li>• Skilled at asking penetrating questions to define the problem accurately.</li> <li>• Engages key stakeholders in solution development, understands impact and recognizes other applications of solution.</li> <li>• Demonstrates resourcefulness in seeking out, defining, and evaluating possible solutions and processes already in place using available resources.</li> <li>• Capable of coaching and training study team members on analytical methods for applying logic and solving problems.</li> <li>• Proactively clarifies/identifies appropriate venue/individuals for decision making throughout the problem solving/decision making process.</li> </ul>	<ul style="list-style-type: none"> <li>• Establishes a team culture of taking accountability for solving problems and developing practical, implementable solutions.</li> <li>• Considers big picture, immediate and long-term implications of any solution.</li> <li>• Understands and utilizes in-depth knowledge of the functional area, business strategies, and the company's goals to make decisions or resolve issues.</li> <li>• Encourages and coaches teams and functional areas to leverage pattern and trend data and think critically about new approaches and better solutions.</li> </ul>

# "Selfless"

Definitions	Foundational	Advanced	Mastery
<p>Skill in rallying support and negotiating around conflict through persuasion, diplomacy, and organizational agility</p> <p>Key elements:</p> <ul style="list-style-type: none"> <li>• <b>Team player:</b> someone who values teamwork and recognizes that the success of the company depends on the efforts of many individuals working together.</li> <li>• <b>Selfless:</b> willing to put aside personal interests and agendas to contribute to the greater good.</li> <li>• <b>Values-driven:</b> embodies the company's values and mission.</li> <li>• <b>Accountable:</b> takes responsibility for their work and admits mistakes.</li> <li>• <b>Open to feedback:</b> actively seeks feedback and uses it to improve their performance.</li> <li>• <b>Constructive feedback provider:</b> willing to provide feedback to help others grow and develop.</li> <li>• <b>Conflict manager:</b> able to manage conflict effectively, build consensus, and advocate for the interests of the team or organization in a way that is respectful and professional.</li> </ul>	<ul style="list-style-type: none"> <li>• Are team players who recognize that the success of the company depends on the efforts of many individuals working together.</li> <li>• Willing to put aside their personal interests and agendas to contribute to the greater good.</li> <li>• Embodies the company's values and mission.</li> <li>• Actively seek feedback and use it to improve their performance.</li> </ul>	<ul style="list-style-type: none"> <li>• Accountable for their work and are willing to admit when they make mistakes.</li> <li>• Willing to provide constructive feedback to others to help them grow and develop.</li> <li>• Prioritizes the needs of the team or organization thru the ability to manage conflict effectively, build consensus around shared goals, and advocate for the interests of the team or organization in a way that is respectful and professional.</li> <li>• Someone who values teamwork and recognizes that the success of the company depends on the efforts of many individuals working together</li> </ul>	<ul style="list-style-type: none"> <li>• Takes the initiative to lead projects and initiatives that align with the company's mission and values, and they inspire and motivate others to do the same.</li> <li>• Dedicated to mentoring and developing others.</li> <li>• Take the time to listen, guide, and support others in their personal and professional growth.</li> <li>• Share their knowledge and expertise with others to help them succeed in their roles.</li> </ul>

# “Fun” Teamwork and Relationship Building

Definitions	Foundational <i>Active participant and willing and consistent collaborator</i>	Advanced <i>Proactively building trust-based relationships across the organization and managing conflict</i>	Mastery <i>Building and fostering high-performing teams</i>
<p>Key elements:</p> <ul style="list-style-type: none"> <li>• <b>Relationship building:</b> Develops and maintains strong relationships across departments/teams and expands networks outside the team.</li> <li>• <b>Team support:</b> Demonstrates eagerness to support others in a team environment.</li> <li>• <b>Conflict resolution:</b> Effective at managing/resolving conflicts with individuals/groups using conflict resolution techniques.</li> <li>• <b>Inclusive collaboration:</b> Creates an inclusive, collaborative environment promoting co-creation, open dialogue, and decision-making.</li> <li>• <b>Accountability:</b> Ensures that team roles and responsibilities are clearly defined, understood, and fulfilled, and models integrity, fairness, and collaborative behavior in all interactions with individuals, teams, and functional areas.</li> <li>• <b>Motivation:</b> Picks up on group positions/intentions/needs, and motivates teams/team members.</li> <li>• <b>Positive workplace culture:</b> Collaborates with others to create a positive and fun workplace culture, celebrates success and accomplishments, and helps team members overcome personal and professional obstacles while maintaining a positive attitude..</li> </ul>	<ul style="list-style-type: none"> <li>• Develops and maintains strong working relationships with people across the department and in cross-functional teams.</li> <li>• In a team environment, demonstrates eagerness to support others' efforts.</li> <li>• Effective at managing/resolving conflict with an individual.</li> <li>• Encourages others to participate in team-building activities</li> <li>• Shares positive feedback and recognition with others</li> </ul>	<ul style="list-style-type: none"> <li>• Proactively extends and expands network and work relationships outside department and team.</li> <li>• In a team environment or when facilitating meetings, creates an inclusive, collaborative environment that promotes co-creation, open dialogue, and decision making.</li> <li>• Ensures that team roles and responsibilities are clearly defined, understood, and fulfilled.</li> <li>• Models integrity, fairness, and collaborative behavior in all interactions with individuals, teams and functional areas.</li> <li>• Effective at managing/resolving conflict within a group setting using a solid understanding of conflict resolution techniques and is able to successfully apply them to achieve positive outcomes</li> </ul>	<ul style="list-style-type: none"> <li>• Actively fosters and recognizes mutually beneficial working relationships with people and departments to move projects toward objectives.</li> <li>• Demonstrates a keen ability to pick up on group positions, intentions, and needs; can recognize what teams' value and use this information to effectively motivate them.</li> <li>• Able to anticipate and prevent conflicts before they even arise, and are adept at navigating complex and challenging conflicts to achieve optimal results</li> </ul>

# “Drive”

Definitions	Foundational <i>Determination, drive, and reliability</i>	Advanced <i>Coaches and inspires others in persistence and continuous</i>	Mastery <i>Building a culture of high performance and self-improvement</i>
<p>Perseverance, action orientation, and strong work ethic even in the face of challenges or setbacks.</p> <p>Key elements:</p> <ul style="list-style-type: none"> <li>Ownership: Prioritizes tasks, takes ownership, and delivers on assigned duties, deadlines, and scope commitments in team and individual situations.</li> <li>Initiative: Demonstrates willingness to take on additional tasks and assignments when appropriate.</li> <li>Positive attitude: Approaches obstacles and challenges as "opportunities" and pursues tasks with energy and determination.</li> <li>Supportive: Demonstrates willingness to go above and beyond to support corporate or departmental needs, or goals</li> <li>Self-improvement: Proactively seeks feedback, builds on strengths, and takes on new responsibilities.</li> <li>Goal-oriented: Models and encourages proactive goal setting, anticipation of opportunities, and a culture of driving results while nurturing self-directedness in team members.</li> </ul>	<ul style="list-style-type: none"> <li>Can be relied on in team and individual situations to prioritize tasks and take ownership of and deliver on assigned duties, deadlines, and scope commitments.</li> <li>Demonstrates willingness to take on additional tasks and assignments when appropriate.</li> <li>Approaches obstacles and challenges as "opportunities" as opposed to "problems".</li> <li>Pursues tasks with energy and drive, employing varied approaches or multiple attempts to ensure goal achievement.</li> </ul>	<ul style="list-style-type: none"> <li>Strong track record of leading multiple work streams to completion with little or no issue escalation.</li> <li>Demonstrates willingness to go above and beyond in order to support corporate or departmental needs, or goals of direct reports.</li> <li>Proactive about getting feedback from others, building on strengths, and taking on new responsibilities.</li> <li>Models and encourages commitment to continuous self-improvement.</li> </ul>	<ul style="list-style-type: none"> <li>Proactively works to ensure that both departmental and cross-functional team members deliver on deadlines and scope commitments.</li> <li>Approaches engagements, both small and large, with energy and motivation that inspires colleagues and teams.</li> <li>Models and encourages a culture of proactive goal setting and anticipation of opportunities while discouraging reactionary approaches</li> <li>Expert at coaching others to drive for results; guides team members in the way that best suits their work style, actively seeking to offer support while nurturing self-directedness.</li> </ul>

# OE: Strategic Planning

Definitions	Foundational <i>Developing strategic insight/planning</i>	Advanced <i>Demonstrating and guiding teams on strategic insight/planning</i>	Mastery <i>Setting strategic direction for product/department</i>
<p>Key elements:</p> <ul style="list-style-type: none"> <li>• <b>Agility:</b> Demonstrates flexibility and responsiveness in adapting to changes in priorities and schedules.</li> <li>• <b>Goal-setting:</b> Sets both short-term and long-term objectives to achieve individual performance goals.</li> <li>• <b>Task management:</b> Breaks down assignments into manageable tasks, sets milestones, and identifies necessary resources.</li> <li>• <b>Risk management:</b> Anticipates potential risks or issues across projects and takes necessary steps to mitigate or address them.</li> <li>• <b>Alignment:</b> Directs the team to ensure alignment between overall direction and interdependencies of various projects and plans.</li> <li>• <b>Task scoping:</b> Demonstrates expertise in accurately scoping out the length and difficulty of tasks.</li> <li>• <b>Strategic vision:</b> Creates effective strategic vision, prepares in advance to take advantage of changing environments.</li> <li>• <b>Ambiguity management:</b> Coping with ambiguity, acting without full information, and dealing with risk and uncertainty.</li> </ul>	<ul style="list-style-type: none"> <li>• Demonstrates agility in responding to reprioritization and scheduling changes.</li> <li>• Sets short-term and longer-term goals for individual performance objectives.</li> <li>• Understands and assesses assignment requirements by breaking them down into tasks, setting milestones, and identifying time, material, and human resources required.</li> </ul>	<ul style="list-style-type: none"> <li>• Anticipates risks or issues across a portfolio of projects and studies, taking the necessary steps to mitigate or address.</li> <li>• Consistently directs the team to ensure alignment between the teams' overall direction and the interdependencies of various projects and plans.</li> <li>• Demonstrated expertise in accurately scoping out length and difficulty of tasks.</li> </ul>	<ul style="list-style-type: none"> <li>• Creates highly effective strategic vision and has a remarkable sense of how situations can unfold; prepares well in advance to take fullest advantage of the changing environment.</li> <li>• Skilled at coping with ambiguity, including an ability to act without full information and demonstrating ease in dealing with risk and uncertainty.</li> <li>• Key contributor in defining product strategy to support company goals; provides input to company goals and establishes functional strategic objectives.</li> <li>• Capable of building alignment with senior management in establishing the overall direction and tasks and interdependencies of various projects.</li> <li>• Directs the team in leveraging all available resources and information to maximize the effectiveness of long- and short-range planning.</li> </ul>

# OE: Project Leadership (Delivering on plan)

Definitions	Foundational <i>Skills for effective Project Leadership</i>	Advanced <i>Skills for DS/DP Project Leadership</i>	Mastery <i>Skills for effective Project Leadership</i>
<p>Leadership within a functional area to deliver on strategic plans</p> <p>Key elements:</p> <ul style="list-style-type: none"> <li>• <b>Risk Management:</b> Effectively identifies risks and issues that impact quality, safety, timelines, and scope, and escalates appropriately.</li> <li>• <b>Prioritization:</b> Ability to prioritize tasks and manage multiple projects simultaneously.</li> <li>• <b>Project Management:</b> Understands project management fundamentals and collaborates with cross-functional teams.</li> <li>• <b>Project Planning:</b> Possesses skills to create project plans, track progress, identify and mitigate risks, and communicate updates to stakeholders.</li> <li>• <b>Accountability:</b> Drives team to be accountable for project scope, timelines, budget/resources, and quality.</li> <li>• <b>Strategic Leadership:</b> Demonstrates capability of directing strategy and leading multiple projects or a complex multiple indication project.</li> <li>• <b>Expertise:</b> Deep expertise in drug development, innovation, and transformative change.</li> <li>• <b>Mentorship:</b> Recognized as experts within their organization and provide guidance and mentorship to others.</li> </ul>	<ul style="list-style-type: none"> <li>• Effectively identifies risks and issues that will impact quality, safety, timelines and scope and escalates appropriately.</li> <li>• Ability to prioritize tasks and manage multiple projects simultaneously</li> <li>• Ability to understand the fundamentals of project management and work collaboratively with cross-functional teams.</li> <li>• Possesses skills to create project plans, tracking progress, identifying and mitigating risks, and communicating updates to stakeholders.</li> </ul>	<ul style="list-style-type: none"> <li>• Drives team to be accountable for project scope, timelines, budget/resources and quality.</li> <li>• Demonstrates capability of directing strategy and leading multiple projects or a complex multiple indication project.</li> </ul>	<ul style="list-style-type: none"> <li>• Deep expertise in drug development, as well as an ability to innovate and drive transformative change.</li> <li>• Recognized as experts within their organization and may be sought out to provide guidance and mentorship to others.</li> <li>• They have demonstrated a high level of knowledge and proficiency in their field and are respected for their expertise.</li> <li>• They have a track record of delivering breakthrough projects and driving change across the organization.</li> <li>• Ability to lead high-performing teams and inspire innovation and creativity among team members.</li> </ul>

# OE: Drug Development and Regulatory Knowledge

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Definitions	Foundational <i>Skills for effective team support</i>	Advanced <i>Skills for effective leadership / management of product Sub-Team</i>	Mastery <i>Skills for effective leadership / management of CMC team</i>
<p>Key elements:</p> <ul style="list-style-type: none"> <li>• <b>Specialization:</b> Highly specialized in a specific field or domain.</li> <li>• <b>Cross-functional understanding:</b> Understanding of the cross-functional drug development process and how various functions work together to bring a drug to market.</li> <li>• <b>CMC Plan:</b> Broad understanding of the general steps and requirements involved in developing a CMC plan for a pharmaceutical product.</li> <li>• <b>Technical writing:</b> Ability to prepare precise technical reports, summaries, protocols, and maintain documentation.</li> <li>• <b>Project planning:</b> General knowledge of the integrated project plan (IPP) and its linkages.</li> <li>• <b>Study execution:</b> Understanding of study protocol objectives, methodology, biostatistical concepts, and data analysis for effective study execution.</li> <li>• <b>Document development:</b> Contributes to drug development planning and drives the development of the IPP, and coaches individuals and teams on drug development concepts and study design nuances.</li> </ul>	<ul style="list-style-type: none"> <li>• Broad understanding of the general steps and requirements involved in developing a CMC (Chemistry, Manufacturing, and Controls) plan for a pharmaceutical product.</li> <li>• Prepare precise technical reports summaries, protocols, quantitative analyses, and maintains appropriate documentation.</li> </ul>	<ul style="list-style-type: none"> <li>• General knowledge of the integrated project plan (IPP) and how various elements are linked.</li> <li>• Demonstrates understanding of study protocol objectives, methodology, biostatistical concepts and data analysis as needed for effective study execution.</li> <li>• Effectively presents results at internal/external meetings</li> <li>• Contributes to drug development planning and document development.</li> </ul>	<ul style="list-style-type: none"> <li>• Able to drive the development of the IPP</li> <li>• Coaches individuals and teams on the concepts and nuances of drug development and study design.</li> </ul>



# OE: Technical Skills - Scientists

Definitions	Foundation <span>BW3</span>	Advanced	Mastery
<p>Key elements:</p> <ul style="list-style-type: none"> <li>• <b>Laboratory Skills:</b> Capable of performing routine experiments, data analysis, and documentation independently.</li> <li>• <b>Collaboration:</b> Effective collaboration with colleagues in cross-functional teams.</li> <li>• <b>Attention to Detail:</b> Showing attention to detail and accuracy in laboratory work.</li> <li>• <b>Communication:</b> Clear and accurate communication about experimental results and observations.</li> <li>• <b>Analytical Methods: Developing and optimizing analytical methods, and leading projects with cross-functional teams.</b></li> <li>• <b>Technical Discretion:</b> Exercising significant technical discretion in design, execution, and interpretation of experiments.</li> <li>• <b>Problem-Solving:</b> Applying critical thinking and problem-solving skills to troubleshoot issues or optimize processes.</li> <li>• <b>Subject Matter Expert:</b> Deep expertise in multiple analytical techniques, laboratory equipment, or process technologies, and serving as a subject matter expert.</li> <li>• <b>Time management and organization:</b> They have excellent time management and organizational skills, enabling them to prioritize and manage multiple tasks and projects effectively.</li> </ul>	<ul style="list-style-type: none"> <li>• Capable of independently performing routine laboratory experiments, data analysis, and documentation.</li> <li>• Works under the guidance of more experienced scientists and would be in the process of building their technical skills and scientific knowledge.</li> <li>• Collaborating effectively with colleagues in cross-functional teams.</li> <li>• Showing attention to detail and accuracy in laboratory work.</li> <li>• Communicating clearly and accurately about experimental results and observations.</li> </ul>	<ul style="list-style-type: none"> <li>• Able to develop and optimize analytical methods, and would be capable of leading projects and collaborating with cross-functional teams.</li> <li>• Exercises significant technical discretion in design, execution and interpretation, and pursues new experiments as a result of experimental outcomes.</li> <li>• Independently designing and executing experiments or analyses, with minimal supervision.</li> <li>• Applying critical thinking and problem-solving skills to troubleshoot issues or optimize processes.</li> </ul> <p><span>BW2</span></p>	<ul style="list-style-type: none"> <li>• Demonstrating deep expertise in multiple analytical techniques, laboratory equipment, or process technologies and serving as subject matter expert.</li> <li>• Has a deep understanding of the scientific principles underlying drug development and would be able to apply this knowledge to solve complex problems.</li> <li>• Responsible for leading projects, mentoring junior scientists, and/or contributing to the development of the company's scientific strategy.</li> <li>• Ability to lead complex projects or programs related to drug development, analytical methods, or process development</li> </ul>



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**BW0** Can combine with #6 in this column

Benjamin Wang, 2023-03-14T16:38:54.813

**BW1** Overall these skills are bucketed into two areas:

- Lab/mfg. knowledge of process or analytical areas

- Applying this knowledge to product/drug development and other functional areas

Benjamin Wang, 2023-03-14T16:44:27.221

**BW2** Foundational: Independently executing experiments and analysis

Advanced: Independently designing experiments.

Benjamin Wang, 2023-03-14T16:47:55.278

**MW2 0** Added Exercises significant technical discretion in design, execution and interpretation, and pursues new experiments as a result of experimental outcomes

Marcus Wong, 2023-04-12T19:43:22.254

**BW3** Include potential for functional area lead for CMC team for products - not required

Benjamin Wang, 2023-03-14T17:02:22.447

# OE: Technical Skills - Technical Managers

Definitions	Foundational <i>Effective in Product Development</i>	Advanced <i>Successful in Product Development</i>	Mastery <i>Expert and Leaders in Product Development</i>
<p>Key elements:</p> <ul style="list-style-type: none"> <li>• <b>Process Improvement:</b> Participates in initiatives and suggests improvements to existing processes.</li> <li>• <b>SOP Adherence:</b> Accurately follows standard operating procedures and work instructions.</li> <li>• <b>Process Development:</b> Shows understanding of process development and optimization principles.</li> <li>• <b>Technical Proficiency:</b> Experienced in validation protocols, troubleshooting technical issues, and managing documentation.</li> <li>• <b>Mentorship:</b> Mentors and trains junior staff on process development, optimization, and validation.</li> <li>• <b>Technical Leadership:</b> A seasoned expert in process development and manufacturing, with a track record of leading large, cross-functional teams to achieve business objectives.</li> </ul>	<ul style="list-style-type: none"> <li>• Participates in process improvement initiatives and suggests process improvements.</li> <li>• Follows standard operating procedures (SOPs) and work instructions accurately.</li> <li>• Shows an understanding of the principles of process development and optimization.</li> </ul>	<ul style="list-style-type: none"> <li>• Experienced in developing and executing validation protocols, troubleshooting technical issues, and managing technical documentation.</li> <li>• Utilizes statistical process control (SPC) techniques to analyze process data and identify trends.</li> <li>• Participates in regulatory inspections and audits.</li> <li>• Mentors and trains junior staff on process development, optimization, and validation.</li> </ul>	<ul style="list-style-type: none"> <li>• Seasoned expert in the technical aspects of process development and manufacturing.</li> <li>• Leader and mentor, and they have a track record of successfully leading large, cross-functional teams to achieve business objectives.</li> <li>• They are influential in shaping the strategic direction of the company and driving innovation.</li> <li>• Identifies and implements new technologies to improve process efficiency and quality.</li> <li>• Develops and maintains relationships with regulatory agencies to ensure compliance with regulations and guidelines.</li> </ul>

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**BW0** Combine with 1st item.  
Benjamin Wang, 2023-03-21T18:57:35.058

**BW1** Director and higher for scientist/technical mgr should be the same.

We should talk about how mgr compares with sci 1/2, sr mgr compares with sr sci 1/2, and principal sci compares with AD. Since we are a small company, I think of them being similar.

If we are differentiating between the two for a position in the same group, the management track would have more "people management" activities.

We should also discuss if there are different expectations between mfg. and development for technical mgrs.  
Benjamin Wang, 2023-03-21T19:00:14.350

# OE: Technical Skills – Project Managers



Definitions	Foundational <i>Effective in Project Management</i>	Advanced <i>Successful in Project Management</i>	Mastery <i>Expert in in Project Management</i>
<p>Key elements:</p> <ul style="list-style-type: none"> <li>• <b>Scheduling proficiency:</b> Skilled with current scheduling and PM tools, and acts as the main point of contact for project team schedules and deliverables.</li> <li>• <b>Stakeholder communication:</b> Effectively communicates project status and updates to stakeholders.</li> <li>• <b>Dependency management:</b> Effectively manages project dependencies and critical paths.</li> <li>• <b>Executive communication:</b> Effectively communicates project outcomes and value to executive stakeholders.</li> <li>• <b>Accountability driving:</b> Drives team towards accountability in managing project management trade-offs among scope, timelines, budget/resources, and quality.</li> <li>• <b>Strategic leadership:</b> Capable of directing strategy and leading multiple projects.</li> <li>• <b>Project delivery:</b> Has a track record of delivering projects on time, within budget, and to the satisfaction of stakeholders.</li> <li>• <b>Mentorship and expertise:</b> Recognized as an expert in project management, sought-after mentor and coach, and a proven track record of developing the next generation of project management leaders.</li> </ul>	<ul style="list-style-type: none"> <li>• Proficient with current scheduling and other PM tools and techniques, working independently as the point of contact for project team schedules and deliverables.</li> <li>• Can effectively communicate project status and updates to stakeholders.</li> <li>• Can effectively manage project dependencies and critical paths.</li> <li>• Can effectively communicate project outcomes and value to executive stakeholders.</li> </ul>	<ul style="list-style-type: none"> <li>• Actively manages project management trade-offs among scope, timelines, budget/resources and quality and drives team toward accountability in these areas.</li> <li>• Demonstrates capability of directing strategy and leading multiple projects</li> <li>• Has a track record of delivering projects on time, within budget, and to the satisfaction of stakeholders.</li> </ul>	<ul style="list-style-type: none"> <li>• Proven skills/capability to direct strategy and lead multiple projects or a complex multiple indication project effectively, including through creative and efficient resolution of issues.</li> <li>• Recognized expert in project management.</li> <li>• They are a sought-after mentor and coach, and have a proven track record of developing and nurturing the next generation of project management leaders.</li> </ul>

# OE: Knowledge Management / Scientists

	Definitions	Foundational	Advanced	Mastery
Technical Managers / Scientists	<p>Key elements:</p> <ul style="list-style-type: none"> <li>• <b>Documentation:</b> Consistently maintains accurate records of experimental procedures and results.</li> <li>• <b>Procedure clarity:</b> Provides clear and detailed descriptions of experimental procedures, including modifications and troubleshooting.</li> <li>• <b>Report organization:</b> Produces well-organized reports that communicate purpose, methods, results, and conclusions of the study.</li> <li>• <b>Data analysis:</b> Analyzes and interprets experimental data to identify patterns and trends and provides recommendations for further research.</li> <li>• <b>Data interpretation:</b> Can interpret data to draw conclusions and make recommendations for further research.</li> <li>• <b>Presentation skills:</b> Able to communicate scientific findings and data effectively to various audiences.</li> <li>• <b>Research skills:</b> Possesses strong research skills and understands the importance of accurate and clear documentation in scientific research.</li> </ul>	<ul style="list-style-type: none"> <li>• Understands the importance of documentation in scientific research and consistently maintains accurate records of experimental procedures and results.</li> <li>• Clear and detailed descriptions of experimental procedures, including any modifications or troubleshooting that was required</li> </ul>	<ul style="list-style-type: none"> <li>• Well-organized and structured reports that clearly communicate the purpose, methods, results, and conclusions of the study</li> </ul>	<ul style="list-style-type: none"> <li>• Can analyze and interpret experimental data to identify patterns and trends and provide recommendations for further research.</li> <li>• Can document and communicate scientific findings and data to a variety of audiences, including scientific peers, policymakers, and the general public.</li> </ul>
		<ul style="list-style-type: none"> <li>• Examples: Lab Notebooks, Protocols, Reports,</li> </ul>	<ul style="list-style-type: none"> <li>• Examples:</li> </ul>	<ul style="list-style-type: none"> <li>• Examples:</li> </ul>

# OE: Knowledge Management / Project Managers

	Definitions	Foundational	Advanced	Mastery
Project Managers	<p>Key elements:</p> <ul style="list-style-type: none"> <li>• <b>Project documentation:</b> Creates project documents and status reports, documents requirements and scope, and tracks budget and expenses.</li> <li>• <b>Document accuracy:</b> Ensures accuracy of transcribed and written project documents.</li> <li>• <b>Communication through documentation:</b> Communicates project progress and issues effectively through documentation.</li> <li>• <b>Meeting notes:</b> Takes notes during meetings to capture important information.</li> <li>• <b>Document organization:</b> Keeps track of important project documents and files.</li> <li>• <b>Complex documentation:</b> Can effectively document complex project requirements, changes, risks, and mitigation plans.</li> <li>• <b>Documentation standards:</b> Develops and implements documentation standards and processes to ensure consistency and quality.</li> <li>• Reporting skills and generating these essential project management documents, you can keep stakeholders informed, mitigate risks, and ensure that your project is on track to meet its objectives</li> </ul>	<ul style="list-style-type: none"> <li>• Able to create basic project documents such as a project charter, project plan, and status reports.</li> <li>• Responsible for the accuracy of transcribed documents related to management of the project</li> <li>• Can communicate project progress and issues effectively through documentation.</li> <li>• Can document project requirements and scope</li> <li>• Regularly attending meetings and taking notes to capture important information.</li> <li>• Keeping track of important documents and files related to their work.</li> <li>• Developing and implementing processes for capturing and organizing knowledge, such as using a knowledge management system.</li> <li>• Able to use project management software to generate documentation and report progress, such as Microsoft Project or Asana.</li> <li>• Asking questions to clarify understanding and gather additional information.</li> <li>• Understands the importance of documentation in project management and consistently maintains accurate project records.</li> </ul>	<ul style="list-style-type: none"> <li>• Can effectively document complex project requirements and changes.</li> <li>• Can document project risks and mitigation plans.</li> <li>• Can document project budget, expenses, and forecasted costs.</li> <li>• Responsible for the accuracy of written documents related to management of the project</li> <li>• Can use advanced data visualization techniques to present project data in a clear and concise manner.</li> <li>• Can develop comprehensive presentation materials such as executive summaries, project plans, decision making, seeking endorsement, and status reports, that are tailored to specific audiences and stakeholders.</li> <li>• Able to use presentation software to generate professional-looking materials, such as PowerPoint or Keynote.</li> <li>• Can develop comprehensive project documentation, including risk management plans, change management plans, and stakeholder management plans.</li> <li>• Can document project communication plans and update them as needed</li> </ul>	<ul style="list-style-type: none"> <li>• Can develop and implement documentation standards and processes that ensure consistency and quality.</li> <li>• Can document and communicate project performance metrics, including cost, schedule, and quality, to stakeholders at all levels of the organization.</li> <li>• Can analyze project documentation to identify patterns and trends and provide recommendations for improving project performance.</li> </ul>
		<ul style="list-style-type: none"> <li>• Examples: Project Charters, Project Schedule / Project plans, status reports, Meeting Minutes, Decision Logs, Action items, Risk management reports, Governance</li> </ul>	<ul style="list-style-type: none"> <li>• Examples: Budget reports, Risk management plans, change management plans, stakeholder management plans, Resource allocation reports, Performance Reports, Business Reviews, Project Closure Report</li> </ul>	<ul style="list-style-type: none"> <li>• Examples: Executive Management Review, Stakeholder communication plan</li> </ul>

# OE: People Management / Cross Functional Team Management

Definitions	Foundational	Advanced	Mastery
<p>Key Elements:</p> <ul style="list-style-type: none"> <li>• <b>Clear communication:</b> Communicates objectives, tasks, goals, and expectations clearly and sets realistic standards.</li> <li>• <b>Ongoing feedback:</b> Enables ongoing feedback flow to team, including positive and corrective performance feedback.</li> <li>• <b>Goal alignment:</b> Ensures direct reports' goals and objectives are aligned with department and corporate goals.</li> <li>• <b>Career development:</b> Supports direct reports' career development goals and plans, including stretch projects and training opportunities.</li> <li>• <b>Performance management:</b> Diagnoses performance issues and escalates appropriately, with empathy and understanding for team members.</li> <li>• <b>Team collaboration:</b> Encourages collaboration and teamwork to foster a positive and productive team culture.</li> <li>• <b>Development coaching:</b> Demonstrates mastery of development and coaching approaches to suit individual learning styles.</li> <li>• <b>Change management:</b> Ability to recognize when it's necessary for the company to change, understanding the potential effects of the change, and being able to communicate the benefits and consequences of the change to everyone involved.</li> </ul>	<ul style="list-style-type: none"> <li>• Clearly communicates objectives, tasks, goals, and expectations and sets realistic standards.</li> <li>• Enables ongoing feedback flow to team, including specific performance feedback, both positive and corrective, as soon as possible after an event.</li> <li>• Ensures direct reports' goals and objectives are aligned with department and corporate goals and objectives.</li> <li>• Aware of direct reports' career development goals and plans. Supports planning and goal setting process, including proactively arranging stretch projects and training opportunities.</li> <li>• Able to diagnose performance issues, have appropriate discussions with team members about performance. Escalates to management and/or HR appropriately.</li> <li>• Show empathy and understanding when team members encounter challenges or difficulties.</li> <li>• Encourage collaboration and teamwork to foster a positive and productive team culture.</li> <li>• Collaborate with other teams and departments to achieve organizational goals.</li> </ul>	<ul style="list-style-type: none"> <li>• Demonstrates mastery of a variety of development and coaching approaches to suit individual learning styles.</li> <li>• Adept at managing multiple levels of personnel (direct reports who manage their own direct reports).</li> <li>• Skilled motivator, demonstrating an ability to empower employees by giving latitude, offering encouragement, and expressing confidence.</li> <li>• Adept at diagnosing performance issues and providing guidance to junior managers on approaches and available tools to handle delicate situations.</li> <li>• Encourages innovative solutions from team members; serves as a role model for change by striving for continuous improvement.</li> <li>• Foster a culture of innovation and continuous improvement.</li> </ul>	<ul style="list-style-type: none"> <li>• Contributes to and helps to implement the department's training and development strategy and ensures that training policies support the strategy and drive the desired behaviors.</li> <li>• Communicates organizational strategies, plans, procedures and objectives of career development infrastructure.</li> <li>• Ability to recognize when it's necessary for the company to change, understanding the potential effects of the change, and being able to communicate the benefits and consequences of the change to everyone involved.</li> <li>• Provide support to those leading the change within the company.</li> </ul> <p>KLO</p>



## Slide 45

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**KLO** could this line be simplified? Not sure if we have or need to mention Global changes here at Allakos  
Kevin Lafontaine, 2023-03-30T19:51:55.343

**MW0 0** Good point. I rephrased this  
Marcus Wong, 2023-04-12T19:10:16.164

# OE: Technical Skills – Project Managers



Definitions	Foundational <i>Effective in Project Management</i>	Advanced <i>Successful in Project Management</i>	Mastery <i>Expert in in Project Management</i>
<p>Key elements:</p> <ul style="list-style-type: none"> <li>• Effective execution of project management principles and tools.</li> <li>• Meeting management.</li> <li>• Timeline management and balance of timeline and quality.</li> <li>• Issues management and escalation.</li> <li>• Process Improvement.</li> <li>• Managing Complexity</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Project Planning:</b> The ability to develop a comprehensive project plan, including timelines, budgets, and resource allocation.</li> <li>• <b>Communication:</b> The ability to clearly and effectively communicate project goals, objectives, and status updates to stakeholders and team members.</li> <li>• <b>Risk Management:</b> The ability to identify potential risks to a project and develop strategies to mitigate those risks.</li> <li>• <b>Task Management:</b> The ability to organize and manage project tasks, deadlines, and deliverables.</li> <li>• <b>Team Management:</b> The ability to lead and motivate team members, delegate tasks, and resolve conflicts.</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Stakeholder Management:</b> The ability to identify and manage project stakeholders, including customers, team members, vendors, and external partners.</li> <li>• <b>Resource Management:</b> The ability to manage project resources, including personnel, equipment, and materials, in an efficient and effective manner.</li> <li>• <b>Change Management:</b> The ability to manage changes to a project scope, schedule, or budget while minimizing the impact on project goals and objectives.</li> <li>• <b>Quality Management:</b> The ability to ensure project deliverables meet quality standards and meet or exceed customer expectations.</li> <li>• <b>Financial Management:</b> The ability to manage project finances, including budgeting, forecasting, and cost control.</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Strategic Planning:</b> The ability to align project goals with broader organizational objectives and develop a long-term project roadmap.</li> <li>• <b>Leadership:</b> The ability to inspire and motivate team members, create a positive team culture, and drive project success.</li> <li>• <b>Negotiation:</b> The ability to negotiate project terms, contracts, and agreements with stakeholders and vendors.</li> <li>• <b>Innovation:</b> The ability to identify and implement innovative solutions to project challenges, and to encourage and facilitate creative thinking among team members.</li> <li>• <b>Business Acumen:</b> The ability to understand and analyze the business implications of a project, including its impact on revenue, profits, and customer satisfaction.</li> </ul>

# OE: Knowledge Management / Project Managers

	Definitions	Foundational	Advanced	Mastery
Project Managers	<p>Key elements:</p> <ul style="list-style-type: none"> <li>Reporting skills and generating these essential project management documents, you can keep stakeholders informed, mitigate risks, and ensure that your project is on track to meet its objectives</li> </ul>	<ul style="list-style-type: none"> <li><b>Information Architecture:</b> The ability to organize and structure information in a way that facilitates knowledge sharing and retrieval.</li> <li><b>Knowledge Capture:</b> The ability to identify, collect, and store relevant knowledge and information in a way that makes it easily accessible to team members.</li> <li><b>Knowledge Retrieval:</b> The ability to search for and retrieve relevant knowledge and information quickly and efficiently.</li> <li><b>Collaboration:</b> The ability to facilitate collaboration and knowledge sharing among team members using various tools and technologies.</li> <li><b>Documentation:</b> The ability to create and maintain accurate and up-to-date documentation related to project activities, decisions, and outcomes.</li> </ul>	<ul style="list-style-type: none"> <li><b>Taxonomy Development:</b> The ability to develop and implement a taxonomy that reflects the structure and content of the knowledge base.</li> <li><b>Knowledge Transfer:</b> The ability to transfer knowledge and expertise between team members and across different projects and teams.</li> <li><b>Communities of Practice:</b> The ability to foster and facilitate communities of practice that promote knowledge sharing, collaboration, and innovation.</li> <li><b>Data Management:</b> The ability to manage data and information resources, including storage, security, and privacy.</li> <li><b>Intellectual Property:</b> The ability to identify and protect valuable intellectual property assets, such as patents, trademarks, and copyrights.</li> </ul>	<ul style="list-style-type: none"> <li><b>Knowledge Management Strategy:</b> The ability to develop and implement a comprehensive knowledge management strategy that aligns with the organization's goals and objectives.</li> <li><b>Learning Culture:</b> The ability to create a learning culture that values continuous learning, experimentation, and innovation.</li> <li><b>Analytics and Metrics:</b> The ability to measure the impact of knowledge management initiatives on project outcomes and business performance.</li> <li><b>Innovation Management:</b> The ability to identify and foster innovation opportunities by leveraging existing knowledge and expertise.</li> <li><b>Change Management:</b> The ability to manage change related to knowledge management initiatives, including resistance to change and the need for cultural transformation</li> </ul>
		<ul style="list-style-type: none"> <li>Examples: Project Charters, Project Schedule / Project plans, status reports, Meeting Minutes, Decision Logs, Action items, Risk management reports, Governance</li> </ul>	<ul style="list-style-type: none"> <li>Examples: Budget reports, Risk management plans, change management plans, stakeholder management plans, Resource allocation reports, Performance Reports, Business Reviews, Project Closure Report, <b>Lessons Learned Report</b>,</li> </ul>	<ul style="list-style-type: none"> <li>Examples: Executive Management Review, Stakeholder communication plan</li> </ul>