

Business Generalist Competency Set

About the Set

The Business Generalist Competency Set was developed using validated skills identified by Ascend's Workforce Council members. The competency set (which can be found on the following pages) outlines competencies across communication, problem solving, planning, technology, data, creativity, strategy, and workplace readiness, capturing the broad range of skills essential for entry-level success in business.

This competency set is intended to support employers in selecting the most relevant competencies to design a WBL experience that aligns with their needs and supports high school students in preparing for a variety of entry-level business roles.

Purpose of the Competency Set

The [Business Generalist Competency Set](#) is not intended to define one specific WBL program. Instead, it is a flexible resource that allows employers to select relevant competencies and design any WBL experience that is tailored to their organization's needs, the length of time they will work with students, and the type of WBL model they choose to implement.

About the Role

The Business Generalist occupation was created specifically for high school work-based learning (WBL) experiences in office-based environments. Business generalists perform a variety of functions that support both the daily operations and strategic goals of an organization. Their responsibilities may include:

- Handling administrative tasks
- Coordinating client or customer communications
- Supporting human resources processes
- Contributing to marketing initiatives
- Assisting with budget tracking or financial record management



COMPETENCY SET KEY TERMS AND DEFINITIONS

Term	Definition
Competency	A broader combination of skills, knowledge, and behaviors that enable someone to perform effectively in a role or context.
Competency Set	A structured list of the competencies someone must master by the end of a particular WBL experience.
Competency Theme	A grouping of related competencies under a shared professional theme or category, organizing the framework by type of activity or expertise.
Job Functions	Define the core activities and responsibilities involved in a role. They describe the type of work someone performs, regardless of their specific job title.
Occupation Overview	Provides a general outline of the roles, responsibilities, job functions, and key competencies associated with an occupation. It describes the types of tasks professionals in this field may perform and the skills needed to succeed across related jobs.
Relevant Department	Specialized functional areas within an organization that group together employees, processes, and resources to carry out specific tasks or responsibilities.
Skills	Specific, observable actions or abilities that can be measured; multiple skills come together to form a broader competency.

Note: This Competency Set is not designed for a particular WBL experience. Instead, it allows employers the flexibility to select and shape experiences that best fit their organization needs.



Competency Themes Quick Glance

The themes below represent groups of related competencies organized by a shared professional focus or area of expertise. Each theme reflects a key activity or skill set for the Business Generalist occupation, as defined by the Workforce Council. Click on any theme to go directly to its full competency set.

[A. Professional Communication & Collaboration](#)

[B. Creativity & Visual Communication](#)

[C. Critical Thinking & Problem Solving](#)

[D. Planning & Project Management](#)

[E. Workplace Readiness & Self-Management](#)

[F. Digital & Technical Literacy](#)

[G. Data Literacy & Analysis](#)

[H: Business Strategy](#)

[I. Financial Tools & Literacy](#)

[J. Ethics, Policy & Compliance](#)

[K: People & Talent Management](#)



Theme A	Professional Communication & Collaboration
Competency A1	Communicate clearly and professionally in both written and verbal formats, including emails, reports, and presentations.
Relevant Departments	<ul style="list-style-type: none"> • Administrative Support • Accounting/Finance • Business Operations • Human Resources • IT • Legal • Marketing/Communications • Sales/Customer Service
Skills	<ul style="list-style-type: none"> • Clear written & verbal communication • Professional communication • Verbal & written (email etiquette) • Public speaking • Presentation & communication • Reporting data visually • Meeting minutes • Note-taking • Canvassing written materials • Professional timely follow-up
Job Functions	<ol style="list-style-type: none"> 1. Develop and use effective communication strategies. 2. Demonstrate professional email and phone etiquette, monitoring and tracking key deadlines, and issuing appropriate reminders. 3. Communicate professionally in both group- and one-on-one settings. 4. Write and organize informational materials that meet applicable quality standards related to order, clarity, conciseness, style, and terminology. 5. Express material in a clear, concise, and accessible manner using plain text, tailored to the intended audience. 6. Review all written communication to ensure proper usage of grammar, spelling, punctuation, and adherence to relevant style guide. 7. Use effective presentation strategies and communication principles to deliver presentations. 8. Demonstrate professional etiquette over all communication methods, including responding in a timely manner. 9. Use positive and respectful verbal, nonverbal, and written communication with colleagues and clients. 10. Maintain clients' privacy and professionalism outside of work, including when using social media.
Competency A2	Participate in meetings by taking notes, summarizing discussions, and contributing ideas effectively.
Relevant Departments	<ul style="list-style-type: none"> • Administrative Support • Business Operations



	<ul style="list-style-type: none"> • Sales/Customer Service
Skills	<ul style="list-style-type: none"> • Meeting minutes • Note-taking • Public speaking • Presentations
Job Functions	<ol style="list-style-type: none"> 1. Attend team discussions/meetings and documents meeting output. 2. Collaborate with others and documents problems during team discussions/meetings. 3. Recognize and document knowledge, skills and experience of others in relation to both team and organizational objectives. 4. Leverage principles of effective communication to collaborate. 5. Use effective presentation strategies and communication principles to deliver presentations. 6. Adjust presentation to match needs and preferences of audience. 7. Prepare and present presentations. 8. Use professional technology including web conferencing (e.g., Zoom, Microsoft Teams), spreadsheet programs (e.g., Excel), and other office software as required. 9. Communicate professionally in both group- and one-on-one settings. 10. Record and communicate priorities, responsibilities, timelines and budgets for activities.

Competency A3	Demonstrate empathy and professionalism in interactions and apply basic techniques to resolve interpersonal conflict.
Relevant Departments	<ul style="list-style-type: none"> • Administrative Support • Accounting/Finance • Business Operations • Human Resources • IT • Legal • Marketing/Communications • Sales/Customer Service
Skills	<ul style="list-style-type: none"> • Empathy & interpersonal awareness • Conflict management • Emotional regulation • Expectation management • Employee relations/internal communication • Active listening • Escalation
Job Functions	<ol style="list-style-type: none"> 1. Demonstrate trust, honesty, and integrity. 2. Use positive and respectful verbal, nonverbal, and written communication with coworkers. 3. Foster an environment where team members feel empowered to raise concern. 4. Build trust with team members and communicate with them sensitively. 5. Demonstrate culturally sensitive and proficient interpersonal skills. 6. Recognize and value individual and cultural differences with customers, colleagues and other stakeholders.

	<ol style="list-style-type: none"> 7. Develop a range of communication styles used to respect and reflect the diversity of the workplace, and ensure interactions consistent with social norms, organizational policies and legislative requirements. 8. Use appropriate interpersonal skills to accurately identify customer and stakeholder needs. 9. Use listening skills and open-ended questions to identify others' needs, preferences, motives and objections. 10. Develop and use a variety of communication strategies to establish rapport with clients as appropriate. 11. Communicate calmly and professionally in high stress situations. 12. Facilitate dialogue between disagreeing parties.
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Competency A4	Work cooperatively with individuals and teams across departments to accomplish shared goals.
Relevant Departments	<ul style="list-style-type: none"> • Business Operations • Human Resources • Marketing/Communications • Sales/Customer Service
Skills	<ul style="list-style-type: none"> • Collaboration and teamwork • Work in groups/teams • Internal stakeholder management • Cross-department communication and compliance • Expectation management • Conflict management • Partner coordination
Job Functions	<ol style="list-style-type: none"> 1. Collaborate with others, contributes ideas, and solves problems during team discussions/meetings. 2. Recognize and document knowledge, skills and experience of others in relation to both team and organizational objectives. 3. Leverage principles of effective communication to collaborate and come to mutually beneficial solutions. 4. Interact effectively with team members, including project managers and peers, on a shared project. 5. Clearly present concepts to team members or supervisors and incorporate their feedback into next steps. 6. Foster an environment where team members feel empowered to raise concerns. 7. Build trust with coworkers and communicate with them sensitively. 8. Communicate calmly and professionally in high stress situations. 9. Establish communication and network channels to exchange information and ideas with colleagues or collaborators.

Competency A5	Engage with internal and external stakeholders in a professional and empathetic manner to resolve issues and meet customer needs.
Relevant Departments	<ul style="list-style-type: none"> • Business Operations • Human Resources • Legal • Sales/Customer Service
Skills	<ul style="list-style-type: none"> • Customer-focused mindset



	<ul style="list-style-type: none"> • Stakeholder communication / management • Conflict resolution basics • Empathy • Customer service • Expectation management
Job Functions	<ol style="list-style-type: none"> 1. Provide professional, personalized support to clients or customers by communicating clearly and respectfully, resolving concerns, and managing expectations across written, verbal, and digital channels. 2. Demonstrate culturally sensitive and proficient interpersonal skills. 3. Receives and accepts constructive and critical feedback, and pivots/adapts based on input from peers, clients, and other stakeholders. 4. Coordinate with colleagues, clients, and other stakeholders to clarify goals, requirements, and expectations for professional communications or content. 5. Develop and refine written materials that present complex or technical information clearly for different audiences. 6. Coordinate with internal and external stakeholders to define project or content requirements and ensure clear communication throughout the development process.

Theme B	Creativity & Visual Communication
Competency B1	Support the creation of visually engaging content and assist in planning campaigns and events.
Relevant Departments	<ul style="list-style-type: none"> • Business Operations • Marketing/Communications
Skills	<ul style="list-style-type: none"> • Creativity & idea generation • Graphic design • Photography or video (short-form content) • Organization & planning for events or campaigns • Define company voice • Brand identity • Website & SEO management
Job Functions	<ol style="list-style-type: none"> 1. Select photos, drawings, or charts to support clarity and understanding in materials. 2. Support marketing and communications by contributing to content or sharing plans. 3. Adapt to social media and brand guidelines for client-facing content. 4. Transform abstract concepts into visual stories that communicate ideas. 5. Seek inspiration from diverse sources to develop creative content ideas. 6. Brainstorm visual content for campaigns, events, or digital platforms. 7. Present visual concepts and adjust designs based on team or stakeholder feedback. 8. Use graphic design software (e.g., Adobe or Canva) to create mockups or assets. 9. Create high-quality visuals to support brand identity or storytelling. 10. Combine media (images, text, video) to build digital content for various platforms. 11. Create visuals to explain data or complex ideas in a simple way.



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12. Help create basic marketing materials (flyers, social posts, presentations) to promote a product, campaign, or service.



Theme C	Critical Thinking & Problem Solving
Competency C1	Apply logical thinking and resourcefulness to solve problems, conduct research, and make informed decisions independently.
Relevant Departments	<ul style="list-style-type: none"> • Accounting/Finance • Business Operations • IT • Legal • Marketing/Communications • Sales/Customer Service
Skills	<ul style="list-style-type: none"> • Critical thinking/problem solving • Research and investigation • Independent workflows • Decision-making • Analyzation knowledge • Ability to research and analyze sources
Job Functions	<ol style="list-style-type: none"> 1. Plan and conduct research using structured methods and summarize findings in clear reports or presentations. 2. Develop and track a project plan to meet defined goals or outcomes. 3. Analyze user or customer needs to recommend solutions or develop simple profiles. 4. Collect and analyze information (e.g., feedback, observations, or workplace data) to identify problems and recommend improvements. 5. Gather user feedback or input (e.g., surveys or direct observation) to identify needs and suggest updates to tools, services, or processes. 6. Use FAQs, help articles, or job aids to troubleshoot simple hardware or software issues independently. 7. Prioritize support requests based on urgency and potential impact to ensure efficient response. 8. Monitor system or tool performance and recommend changes to improve function, speed, or reliability.
Competency C2	Recognize workplace issues and propose practical solutions based on research and logical analysis.
Relevant Departments	<ul style="list-style-type: none"> • Administrative Support • Accounting/Finance • Business Operations • Human Resources • IT • Legal • Marketing/Communications • Sales/Customer Service
Skills	<ul style="list-style-type: none"> • Problem solving organic information • Ability to research and analyze sources



Job Functions	<ol style="list-style-type: none"> 1. Conduct research and prepare reports to evaluate the feasibility and impact of business project opportunities. 2. Identify and evaluate marketing or business opportunities to ensure they meet customer or user needs. 3. Identify unmet stakeholder needs and recommend solutions to improve outcomes. 4. Support the management and resolution of customer complaints. 5. Clarify abstract or complex ideas by developing solutions that improve understanding. 6. Identify challenges and develop solutions for addressing them independently, and with assistance from supervisors, as needed. 7. Observe trends or updates in tools, processes, or resources used in the workplace and suggest when updates to materials or instructions might be needed. 8. Collect and analyze information through documentation, observations, feedback, or data to understand current processes and recommend improvements.
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Competency C3	Evaluate risks and prioritize solutions to make informed decisions in fast-paced environments.
Relevant Departments	<ul style="list-style-type: none"> • Business Operations • Legal • Sales/Customer Service
Skills	<ul style="list-style-type: none"> • Stress management • Balanced risk-taking in decision making
Job Functions	<ol style="list-style-type: none"> 1. Report progress and challenges to supervisors and offer alternative ideas or solutions to overcome obstacles. 2. Adapt to changes in local, regional, and national labor market conditions under supervision. 3. Adjust to changing work priorities or external conditions with flexibility and a positive approach. 4. Use input from teammates or supervisors to adjust a plan or next step when the original plan is no longer workable.

Theme D	Planning & Project Management
Competency D1	Manage time effectively, prioritize tasks, and meet deadlines while maintaining accuracy and attention to detail.
Relevant Departments	<ul style="list-style-type: none"> • Administrative Support • Business Operations • Human Resources • Legal • Marketing/Communications



Skills	<ul style="list-style-type: none"> • Time management & task prioritization • Organization • Prioritization & time management • Organizational skills • Tracking details • Punctuality • Accountability
Job Functions	<ol style="list-style-type: none"> 1. Assess and prioritize workload to ensure tasks are completed within identified timeframes, in accordance with organizational requirements. 2. Identify possible challenges to meeting work goals and adjust plans as needed. 3. Identify competing demands and prioritize how to achieve personal, team and organizational goals and objectives. 4. Monitor and adjust personal work performance through self-assessment to ensure achievement of tasks. 5. Monitor own levels of stress and fatigue to ensure ability to work safely and sustainably. 6. Establish short, medium and long-term personal work goals. 7. Complete routine reports at regular intervals according to organizational requirements. 8. Accurately record information in the required format for team use or documentation. 9. Ensure data input meets designated timelines and organizational requirements.

Competency D2 Document workflows, procedures, or technical steps clearly.

Relevant Departments	<ul style="list-style-type: none"> • Business Operations
Skills	<ul style="list-style-type: none"> • Technical writing • Process documentation
Job Functions	<ol style="list-style-type: none"> 1. Gather and analyze information to support documentation. 2. Create and revise documentation. 3. Develop or maintain documentation in the intended publication format (print/digital). 4. Record data and information gathered in approved formats for use by others. 5. Observe a process or task and document the steps in a clear, structured guide.

Competency D3 Support project goals by tracking outreach activity, managing follow-ups, and updating lead progress using digital tools.

Relevant Departments	<ul style="list-style-type: none"> • Marketing/Communications • Sales/Customer Service
Skills	<ul style="list-style-type: none"> • Prospecting including qualifying leads • Researching companies • Networking • Timely follow-up (CRM-based) • Track sales activity and pipeline progress
Job Functions	<ol style="list-style-type: none"> 1. Conduct basic market research to identify potential contacts, organizations, or project opportunities. 2. Enter and update contact records and outreach activity in digital tracking tools (e.g., CRM) under supervision.



	<ol style="list-style-type: none"> 3. Support team outreach by preparing follow-up lists, scheduling check-ins, and tracking progress in a digital system. 4. Research key contacts or companies and summarize findings to support targeted outreach.
Competency D4	Support the planning and coordination of events or projects by managing timelines, logistics, and tasks.
Relevant Departments	<ul style="list-style-type: none"> • Administrative Support • Business Operations • Marketing/Communications
Skills	<ul style="list-style-type: none"> • Organization & planning for events or campaigns • Calendar & project management • Vendor management • Logistics
Job Functions	<ol style="list-style-type: none"> 1. Coordinate logistics and personnel for final documentation and/or project completion. 2. Assist with meetings or interviews by assembling materials and coordinating logistics. 3. Support project managers and business analysts in tracking documentation deliverables, milestones, and deadlines. 4. Document project workflow stages to support planning, coordination, or progress tracking. 5. Gather and organize information to help create reports or share recommendations with the team. 6. Record and communicate priorities, responsibilities, timelines, and budgets for projects or activities. 7. Evaluate the benefits of activities against defined objectives and incorporate in future planning. 8. Coordinate with outside vendors. 9. Coordinate development of documentation and digital content with internal and external stakeholders as needed.

Theme E	Workplace Readiness & Self-Management
Competency E1	Demonstrate professionalism, manage stress, and take initiative in completing work tasks independently.
Relevant Departments	<ul style="list-style-type: none"> • Administrative Support • Accounting/Finance • Business Operations • Human Resources • IT • Legal • Marketing/Communications • Sales/Customer Service
Skills	<ul style="list-style-type: none"> • Self-motivated • Stress management • Versatility in role & environment



	<ul style="list-style-type: none"> • Adaptability/flexibility • Follow directions • Respond with urgency and time management • Coachable
Job Functions	<ol style="list-style-type: none"> 1. Communicate calmly and professionally in high stress situations. 2. Works independently to complete tasks within structured workflows or processes. 3. Proactively seeks inspiration from diverse sources to fuel creativity. 4. Clearly present concepts to team members or supervisors and incorporate their feedback into next steps. 5. Seek feedback on performance to improve skills and abilities. 6. Display flexibility and positivity in adapting to changing work priorities. 7. Manage time and prioritize tasks to meet deadlines and adjust performance through self-assessment when needed. 8. Identify, prioritize and plan professional development opportunities for personal skill development.

Competency E2	Navigate and understand internal structures and workflows to operate effectively within an organization.
Relevant Departments	<ul style="list-style-type: none"> • Business Operations • Human Resources • Marketing/Communications
Skills	<ul style="list-style-type: none"> • Understanding company org chart • Organizational efficiency • Internal communication
Job Functions	<ol style="list-style-type: none"> 1. Understand HR operations and policies. 2. Learn the company organization chart and maintain a simple contact directory with roles and responsibilities. 3. Document basic workflow steps for common tasks and create easy to follow checklists.

Theme F	Digital & Technical Literacy
Competency F1	Operate basic office and digital tools (e.g., printers, databases, spreadsheets) effectively to complete tasks and support team operations.
Relevant Departments	<ul style="list-style-type: none"> • Administrative Support • Accounting/Finance • Business Operations • IT • Legal • Marketing/Communications • Sales/Customer Service
Skills	<ul style="list-style-type: none"> • Use of basic office technology • Typing and general computer knowledge • Basic data entry & spreadsheet use • Basic digital literacy (social media platforms, Canva, email tools, general AI)



	<ul style="list-style-type: none"> • CRM management • Adaptability • Basic understanding of technology
Job Functions	<ol style="list-style-type: none"> 1. Use professional technology including web conferencing (e.g., Zoom, Microsoft Teams), spreadsheet programs (e.g., Excel), and other office software as required. 2. Install, provide user support for, or troubleshoot hardware and commercial software. 3. Assist in maintaining or updating web content and managing user access profiles and authorities. 4. Assist in maintaining documentation in the intended publication format, including print or digital, such as web content or user manuals. 5. Conduct data entry or help maintain digital records and documents, ensuring accurate and consistent formatting. 6. Use customer relationship management (CRM) systems to manage customer interactions and record key account details. 7. Help maintain knowledge management systems and digital files for ease of access and collaboration.

Competency F2	Demonstrate the ability to quickly learn and adapt to new technology and platforms used in the workplace.
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Relevant Departments	<ul style="list-style-type: none"> • Administrative Support • Business Operations • IT
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Skills	<ul style="list-style-type: none"> • Technology/software tools • Adaptability • Basic understanding of technology • Resourceful • Self-directed especially with remote work
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Job Functions	<ol style="list-style-type: none"> 1. Show a willingness to learn and adapt to changes in work, deadlines, and team environment, including new tools. 2. Coordinate with stakeholders and adjust deliverables as needed when technology platforms or client requirements change. 3. Support internal or external clients in using AV/conference technology, requiring frequent learning of new systems. 4. Use and adapt to CRM systems and customer service platforms to manage client accounts effectively.
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Competency F3	Demonstrate foundational technical literacy and basic cybersecurity practices.
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Relevant Departments	<ul style="list-style-type: none"> • IT
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Skills	<ul style="list-style-type: none"> • Basic understanding of code • Cybersecurity
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Job Functions	<ol style="list-style-type: none"> 1. Assist with set up, maintenance, and troubleshooting software and hardware systems. 2. Support digital operations. 3. Assist with applying security protocols and procedures.
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Theme G	Data Literacy & Analysis
Competency G1	Use spreadsheets, databases, or visual tools to organize, analyze, and report data accurately.
Relevant Departments	<ul style="list-style-type: none"> • Accounting/Finance • Business Operations • Marketing/Communications
Skills	<ul style="list-style-type: none"> • Data entry • Finance & accounting information systems (e.g. Power BI) • Report data visually • Tracking details • Data analytics • Accuracy • Tracking expenses
Job Functions	<ol style="list-style-type: none"> 1. Identify and access a range of information systems and databases to manage customer information. 2. Use CRM or SFA tools to manage information and support decision-making. 3. Use professional technology including web conferencing (e.g. Zoom, Microsoft Teams) spreadsheet programs (Excel), and other office software as required. 4. Organize and process electronic data and paper files and assist in creating databases and preparing files for review by team members or supervisors. 5. Demonstrate understanding of standard formats, as well as file naming, folder organization, and shared workspace practices. 6. Use AI-assisted tools to support visual, data-related, or problem-solving tasks in the workplace.
Competency G2	Apply basic numerical reasoning in daily work to complete tasks with accuracy and attention to detail.
Relevant Departments	<ul style="list-style-type: none"> • Accounting/Finance • Business Operations • IT • Sales/Customer Service
Skills	<ul style="list-style-type: none"> • Basic math skills • Numerical accuracy
Job Functions	<ol style="list-style-type: none"> 1. Apply basic math to verify invoice totals, sales figures, or expense entries before final submission. 2. Enter, check, and reconcile numerical data in software systems with a focus on accuracy. 3. Use calculators, spreadsheets, or internal tools to perform routine quantitative tasks in support of business operations. 4. Review a sample of data entries or reports to confirm totals add up correctly and identify any errors for correction.
Competency G3	Interpret and use performance metrics (e.g., annual goals, benchmarks, KPIs) to support goal tracking and decision-making.
Relevant Departments	<ul style="list-style-type: none"> • Accounting/Finance



	<ul style="list-style-type: none"> • Business Operations • Sales/Customer Service
Skills	<ul style="list-style-type: none"> • Interpret measurable metrics / annual goals • Interpret quarter-to-quarter goals
Job Functions	<ol style="list-style-type: none"> 1. Help record and organize sales or service performance data (e.g., number of calls made, orders processed) into weekly or monthly tracking sheets. 2. Support a team in updating visual dashboards or spreadsheets showing progress toward quarterly or annual goals. 3. Assist in comparing current numbers (e.g., customer visits, revenue) to last month's totals to help monitor trends. 4. Maintain a simple glossary of metrics that defines KPIs, how they are calculated, and where the data comes from. 5. Capture action items from a metrics review meeting and log the owner and due date to support follow up on decisions.

Competency G4	Conduct strategic research and analysis to inform workplace decisions.
Relevant Departments	<ul style="list-style-type: none"> • Business Operations • IT • Sales/Customer Service
Skills	<ul style="list-style-type: none"> • Researching companies • Strategic thinking
Job Functions	<ol style="list-style-type: none"> 1. Assist in the development of research methodology and objectives. 2. Conduct market research and identify opportunities. 3. Assist in the development of research reports to provide basic background information to leverage in making strategic decisions. 4. Extract data responsibly to provide basic analysis to supervisors to share preliminary broad trends.

Theme H	Business Strategy
Competency H1	Demonstrate foundational business understanding across roles.
Relevant Departments	<ul style="list-style-type: none"> • Business Operations • IT • Sales/Customer Service
Skills	<ul style="list-style-type: none"> • Foundational business acumen across departments • Understanding of core business functions and structure
Job Functions	<ol style="list-style-type: none"> 1. Observe and document how different departments (e.g., IT, Sales, Operations) contribute to shared company goals. 2. Participate in team discussions where departments explain how their work supports business outcomes. 3. Assist with small projects that involve collaboration between two or more departments (e.g., helping IT support a sales team rollout).



Theme I	Financial Tools & Literacy
Competency I1	Manage budgets using digital tools and apply basic financial literacy in professional contexts.
Relevant Departments	<ul style="list-style-type: none"> • Accounting/Finance • IT • Marketing/Communications
Skills	<ul style="list-style-type: none"> • Budgeting • Budgeting management • Financial knowledge • Understanding of financial technology
Job Functions	<ol style="list-style-type: none"> 1. Support budget tracking by entering and updating expense or purchase data into digital spreadsheets or software tools. 2. Assist in preparing simple financial summaries or reports using templates under supervision. 3. Help organize receipts, invoices, or purchase requests into the correct folders or tracking systems, so they match the budget categories. 4. Assist in scheduling reminders for budget deadlines, such as report submissions or renewal dates, in team calendars.
Competency I2	Understand and navigate core financial systems, including risk and insurance basics.
Relevant Departments	<ul style="list-style-type: none"> • Accounting/Finance • IT
Skills	<ul style="list-style-type: none"> • Basics of insurance • Financial knowledge • Understanding of financial technology
Job Functions	<ol style="list-style-type: none"> 1. Assist in gathering and organizing basic insurance or financial information from public sources or internal summaries under supervision. 2. Support digital documentation of financial procedures or insurance-related workflows using templates or standard checklists. 3. Maintain a simple register of policies, renewal dates, contracts, and links, and add team calendar reminders for upcoming renewals.
Competency I3	Analyze and organize basic financial data to support budgeting, reporting, or decision-making.
Relevant Departments	<ul style="list-style-type: none"> • Accounting/Finance • IT • Marketing/Communications
Skills	<ul style="list-style-type: none"> • Basic financial analysis • Financial knowledge
Job Functions	<ol style="list-style-type: none"> 1. Review and summarize basic financial or performance data in spreadsheets or dashboards using templates provided by the team. 2. Support data collection and formatting for team reports by organizing numbers, charts, or comparisons related to costs, sales, or usage trends. 3. Help check and reconcile data by comparing across spreadsheets, systems, or reports to identify and flag any difference.



	4. Assist in creating simple charts or visuals that highlight key points or trends in financial or performance data for use in team meetings or presentations.
Theme J	Ethics, Policy, & Compliance
Competency J1	Follow company policies and demonstrate ethical behavior, including confidentiality and appropriate handling of sensitive information.
Relevant Departments	<ul style="list-style-type: none"> • Administrative Support • Human Resources • IT • Legal
Skills	<ul style="list-style-type: none"> • Filing, scanning, and organizing legal documents • Follow temporary work contract • General business ethics • Legal roles & responsibilities • Permissions and confidentiality guidelines • Regulations/workplace restrictions • Understanding the company's tech system • Understanding confidentiality
Job Functions	<ol style="list-style-type: none"> 1. Comply with and demonstrate understanding of company policies about inclusivity, equity, and confidentiality. 2. Demonstrate familiarity with organizational policies and processes including confidentiality and permissions. 3. Comply with laws, regulations, standards and policies applicable to the workplace or sector. 4. Demonstrate understanding of Equal Employment Opportunity and labor laws and adhere to related company policies. 5. Monitor and help maintain network security by adhering to security policies, including confidentiality standards. 6. Use secure practices for file sharing and documentation, maintaining compliance with company data governance standards. 7. Demonstrate ethical responsibility in representing client information and ensuring accurate communication.

Theme K	People & Talent Management
Competency K1	Represent and model workplace culture by promoting inclusion, engagement, and professional norms.
Relevant Departments	<ul style="list-style-type: none"> • Business Operations • Human Resources • Marketing/Communications
Skills	<ul style="list-style-type: none"> • Employee engagement & inclusion • Internal communication • Modeling workplace culture
Job Functions	<ol style="list-style-type: none"> 1. Support HR operations and policies. 2. Build trust with employees and communicate with them sensitively.



	<ol style="list-style-type: none"> 3. Demonstrate understanding of employment laws, Equal Employment Opportunity laws, and affirmative action laws, such as the Americans with Disabilities Act. 4. Support compiling feedback from employees to research possible topics for relevant employee trainings. 5. Understand and comply with company policies about inclusivity and equity. 6. Assist in maintaining a workplace free from discrimination and harassment by recognizing and working on own biases. 7. Recognize and take steps to mitigate personal biases in the workplace. 8. Support discussions around employment patterns, such as poor performance, and identify preliminary improvements.
Competency K2	Support and explain employee compensation benefits.
Relevant Departments	<ul style="list-style-type: none"> • Human Resources
Skills	<ul style="list-style-type: none"> • Change management • Employee benefits • Payroll
Job Functions	<ol style="list-style-type: none"> 1. Assist in preparing or updating general informational materials about company benefits, such as internal flyers, FAQs, or welcome packets, under guidance. 2. Support team tasks related to tracking benefit questions or updates using anonymized logs, templates, or digital checklists. 3. Support document preparation of changes to employee benefits, pay, or work environment. 4. Support the coordination of offboarding activities by preparing materials, organizing files, and ensuring required forms are ready for departing employees.
Competency K3	Assist in recruiting and representing the company to new talent.
Relevant Departments	<ul style="list-style-type: none"> • Human Resources
Skills	<ul style="list-style-type: none"> • Early talent engagement • Peer-to-peer recruitment • Representing employer brand
Job Functions	<ol style="list-style-type: none"> 1. Support the development and updating of recruitment strategies (like through job descriptions) through collaboration with management to meet current or anticipated staffing needs. 2. Review employment applications and job descriptions to identify potential applicants qualified for positions. 3. Support the hiring process. 4. Assist with onboarding by preparing orientation materials, setting up meeting spaces or virtual calls, and helping new employees access key resources and information.

