



# The “How” of Success at OPB

## **OPB Competencies**

**People Services**

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## Introduction to the “How” of Success at OPB

This guide has been developed to outline the “How” of success at OPB. Success at the Ontario Pension Board (OPB) is about being really good at doing both the “what we do”, and the “how we do it” of our roles. To be successful at OPB we all need to deliver the “What” of our roles and complete these deliverables the right way, the “How” of our roles. The competency-based approach establishes the skill, knowledge and behaviours that must be present for the individual and the organization to be successful. Successful people excel at delivering both the “what” and the “how”. This equation of success is shown below:



OPB has defined the “How” of this equation with a comprehensive set of competencies aligned to our Advise & Protect vision. Each OPB competency represents professional qualities and industry knowledge that cut across job functions and are relevant to all employees.

The OPB Competencies are further detailed into Profiles for each role within the organization, defining the set of behaviours for each role. There are clear, noticeable differences between Profiles to differentiate between each role and the expectations within it. While in some roles individuals will be responsible for learning a new competency and in other roles individuals will be leading others in demonstrating a competency.

The OPB Competencies serve as a tool for both the organization and the employees. Most importantly, they enable OPB to define what is important to the organization and can be used to drive everything we do; they also support employees in developing or enhancing their capabilities. For employees, the OPB Competencies and Profiles can empower them to effectively manage their own careers by understanding how to be successful within each role in the organization. For the organization, the OPB Competencies, combined with the Profiles, provide a foundation for the core human resource functions and will be integrated into everything we do. OPB will become a competency-based organization.

## Approach to Developing OPB Competencies & Profiles

### Defining OPB Competencies

A strategic and collaborative approach was taken to define the OPB Competencies and the broad knowledge bases necessary to enable an employee to successfully function at OPB. The OPB Competencies were developed using input from our core values, employees across the organizations, and business objectives. The OPB Competencies are based on the underlying skills, behaviours and knowledge required to support our business objectives. The expectations outlined in the 7Ps (Present, Positive, Productive, Performing, Personal Responsibility, Progressing, and Passionate) are also embedded in the OPB Competencies. These behaviours go across job functions and can be demonstrated by all employees at OPB.

### OPB Competencies

The resulting competencies accurately reflect the knowledge, skills, and behaviours necessary for the roles within OPB. The OPB Competencies are designed to enable our vision of Advise & Protect and are:

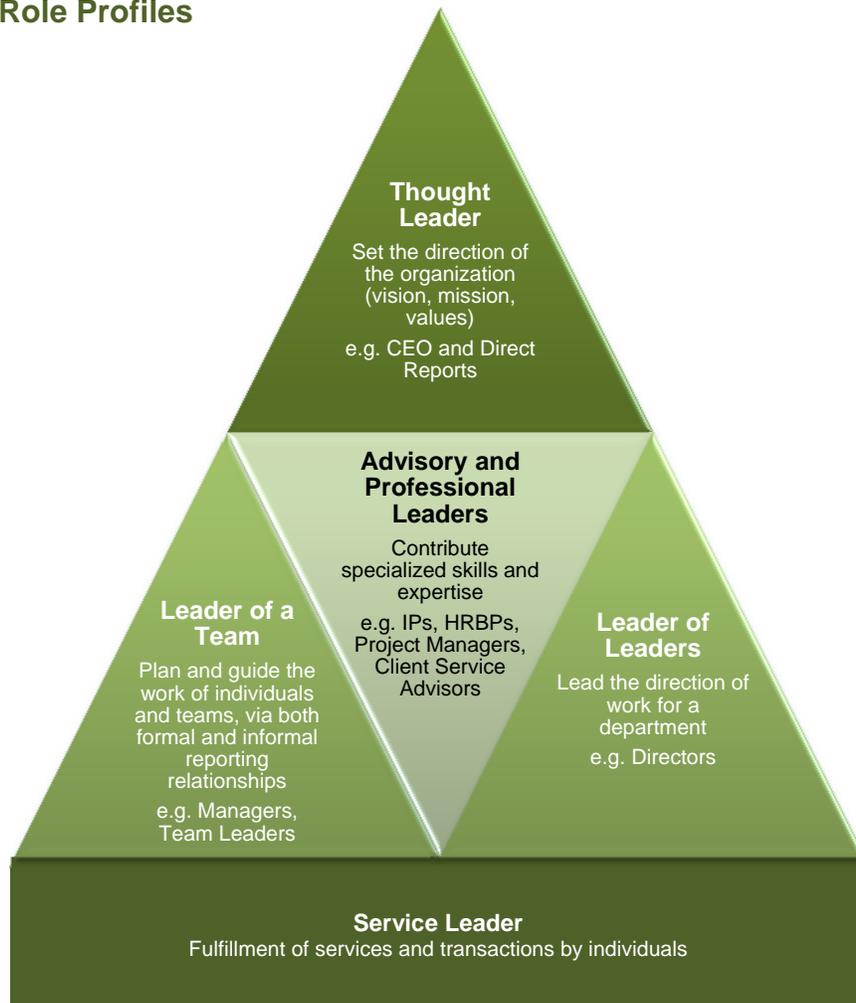


## Profiles

A Profile is a defined set of behaviours for a particular role and reflects the different roles at OPB as well as what we feel is important at OPB. The diagram below shows the five distinct Profiles at OPB. As they do in our careers, Profiles build on the expectations of our prior roles. Each role within OPB is integral to the organization's success. Thought Leaders provide the overall direction for OPB; Service Leaders provide the foundation upon which to deliver results. Leaders of a Team, Advisory and Professional Leaders, and Leaders of Leaders are the roles that ensure that the objectives of the organization are successfully achieved by supporting and leading service delivery.

Career pathways at OPB can consist of a variety of roles. As we change roles throughout our career at OPB we use and build on the behaviours we have learned in our previous role(s). Some of us change roles by moving from a Service Leader role to an Advisory and Professional Leader role while some others take a more traditional career path of moving through levels of management such as: Service Leader to Leader of a Team, to Leader of Leaders to Thought Leader. Others will move back and forth between Advisory and Professional Leaders and management roles.

### Five Role Profiles



The Service Leader role consists of client-facing individuals who respond to client needs. They may progress to an Advisory and Professional Leader role, a Leader of a Team role within their career at OPB, or continue to build upon their expertise in the Service Leader role.

Advisory and Professional Leaders represent OPB's level of advisory service. They demonstrate broad and deep knowledge of their business areas and provide functional and advisory expertise. The Advisory and Professional Leaders provide high touch personalized advice and service and build strong relationships with their clients. Advisory and Professional Leaders may transition to a Leader of a Team role or a Leader of Leaders role or continue to build upon their expertise in the Advisory and Professional Leaders' role.

Leaders of a Team, Leaders of Leaders, and Thought Leaders roles are progressive levels of people leadership within the OPB organization. Regardless of the career pathway that is taken, the behaviours that are acquired along that path are cumulative. Each new role requires that the behaviours of previous roles continue to be demonstrated and serve as a foundation for the additional behaviours expected for the new role.

Each OPB Competency has an overall description and is accompanied by a Profile to clarify the behaviour indicators for each role within OPB. Behaviour indicators provide examples of the types of behaviours expected within each role for a particular OPB Competency. Together, the Profiles and the associated behaviours per role ensure that the OPB Competencies are understood and applied consistency within the organization.

## OPB Competencies, By Role

### Accountable

Demonstrates initiative and commitment to resolve issues, align resources and manage risk to achieve service excellence in alignment with organizational goals and objectives. Accepts full responsibility for self and contribution as a team member, takes ownership for all personal responsibilities and honours commitments.

#### Service Leader

People in this role accept full responsibility for their individual contribution and contribution as a team member; take ownership for all personal responsibilities and honour commitments; confront problems quickly; and display a strong commitment to achieving personal and organizational objectives to achieve positive outcomes for the services provided.

- Openly receive and act on feedback.
- Show integrity – admit, learn and share from mistakes; assuming ownership for their own actions.
- Generate ideas to solve problems and/or address client needs and/or overcome potential constraints that hinder results.
- Accountable for making decisions within their roles to address client needs and issues; ask for clarification when necessary.
- Take the initiative to complete work on time, follow through and meet personal commitments to clients or other stakeholders and manage expectations.
- Proactively identify and address personal shortcomings and continually seek to raise personal standards of work.

#### Advisory and Professional Leader

People in this role accept full responsibility for themselves, taking appropriate steps to achieve results in their respective area of the organization in alignment with strategic objectives. They take ownership of their decision-making processes while considering risk management within the organization.

- Readily accept full ownership and responsibility for issues in own area, admitting to problems, mistakes and/or risks, and recommending options to address these before they become larger issues.
- Accountable for ensuring that commitments made to clients are achieved
- Make decisions in their respective area, consulting others as required and providing input into the decision-making processes within the organization.
- Anticipate, assess, escalate, report and monitor risks in their function and take informed risks,
- Identify ways to manage risk within the department and participate in the problem solving process.
- Challenge the status quo by questioning traditional or established processes.
- Anticipate impacts on internal and/or external stakeholders and obstacles to proposed solutions and address them.

#### Leader of a Team

With a focus on maximizing performance in alignment with strategic objectives and appropriate risk management considerations, people in this role apply decision-making approaches to resolve intermediate/team level problems.

- Provide a safe environment for difficult conversations around challenges and concerns.
- Readily accept full ownership and responsibility for issues in own area, admitting to problems, mistakes and/or risks, and recommending options to address these before they become larger issues.
- Enable team members to resolve problems, assisting them to identify root cause of the problem and identifying opportunities for employees to generate ideas to solve problems.
- Take informed risks and reward informed risk-taking in team members; support them in seeking to challenge the status quo and to try out less established ways of solving problems.
- Anticipate departmental challenges and problems, and support the development and implementation of solutions.
- Generate new perspectives and frameworks that allow problems to be solved and goals to be achieved more effectively, including working to eliminate the need to seek unnecessary permission or approval.

- Communicate with team members, address questions or decisions, and respond appropriately to challenges within the team.
- Delegate decision making responsibilities to the appropriate person and provide the tools to empower employees to make decisions.
- Enable team members by coaching them to relevant resources and contacts to research problems and potential solutions.

### **Leader of Leaders**

With a focus on setting the standards and challenging goals, people in this role develop, implement and evaluate solutions to departmental or cross-functional problems.

- Readily accept full ownership and responsibility for issues in own branch, admitting to problems, mistakes and/or risks, and recommending options to address these before they become larger issues.
- Work with other leaders at OPB to ensure the appropriate allocation of resources, skills and abilities are applied in alignment with OPB's strategic priorities.
- Establish high and demanding standards of value leadership for self and others, consistently act with the highest level of personal integrity and professionalism across a diverse range of situations.
- Review progress on department's goals and objectives regularly and often.
- Identify the 'critical path' to achieve results and then remove the obstacles that get in the way, identify and mitigate risks, and anticipate impact of risk into decision-making processes to propose solutions and address them.
- Identify, analyze, evaluate and monitor risks associated with recommendations and decisions.
- Integrate risk considerations into decision making protocols.

### **Thought Leader**

With a focus on taking calculated risks, people in this role resolve complex and/or organization wide issues that impact multiple groups and make the final decision.

- Make every effort to foster open, honest and sincere communications within the organization.
- Coach team members on effective problem solving tools and methods, share personal learnings, and continuously evaluate the effectiveness of a solution.
- Align resources (people, technology, funding) to organization's strategic plan while balancing the needs of the ongoing operations.
- Review progress on organization's goals and objectives regularly and often.
- Identify and implement ways to embed risk analysis into existing management planning, decision making, change management and oversight activities.
- Presents potentially controversial and/or conflicting positions in ways that facilitate understanding and resolution.

## Strategic Mindset

Understands, implements, and contributes to developing the strategic priorities with an organization-wide view. Drives the strategic priorities and inspires a shared vision for its future direction. Considers issues with a broad perspective, plans for the future and establishes priorities with the organization's interests in mind.

### Service Leader

People in this role develop an understanding of the strategic priorities and apply them within their roles. They apply OPB's long-term vision in delivering their commitments.

- Demonstrate their understanding of OPB's business direction and strategy.
- Actively participate in pursuing OPB's vision by applying their understanding to their role and commitments.
- Use creativity to generate new ideas, options and approaches to identify improvement opportunities within the organization that support OPB's strategic focus.
- Assist with the implementation of continuous improvement measures by incorporating new practices in their roles as applicable.

### Advisory and Professional Leader

People in this role proactively manage the development of new services, programs and projects to improve existing services. They adapt existing services for application in new and different environments and find new solutions to address operational or strategic challenges.

- Contribute to the development of a better service, process or program and better ways of working in alignment with OPB business direction.
- Analyze the current market/industry environment to adapt services in order to address challenges and pursue opportunities present in the external environment.
- Develop new ideas, test their feasibility and share findings with the appropriate leaders within the organization.
- Identify and address critical factors that block or hinder the team's ability to implement client solutions or services.
- Generate and openly share creative ideas; think outside the box, and contribute to a culture which encourages creativity and exploration to benefit the organization.
- Effectively apply existing or develop new practices and processes to new work situations, resulting in better outcomes and service, or enhanced efficiency, for clients.
- Develop new business solutions and/or leverage outside ideas to implement in own department or within the organization.

### Leader of a Team

People in this role are able to see the big picture and understand the implications of OPB's Vision. When working through issues they operate from a broad, long-term perspective, rather than taking a narrow view or focusing only on short-term implications.

- Welcome and nurture new ideas by encouraging team members and others to identify opportunities for continual improvement.
- Identify and address critical factors that block or hinder the team's ability to implement strategic priorities.
- Consider future implications of OPB business direction and weigh the benefits and risks associated with department plans.
- Recognize and reward those who take the initiative to be creative and demonstrate an understanding of the OPB vision.
- Foster an environment that effectively applies existing or new practices and processes to new work situations, resulting in better outcomes and service, or enhanced efficiency, for clients.
- Identify and recognize team capabilities in each critical area of operations and determine means to optimize the strengths and mitigate the risks.
- Foster and build a culture which encourages creativity and exploration.
- Proactively lead and champion the development of new services and the improvement of existing services.

### **Leader of Leaders**

People in this role focus the energy of their department on initiatives that will have the greatest strategic impact. For example, investing in new technology that will pay off in the future or building skills and capabilities that are directed towards delivery of one or more of the strategic initiatives.

- Analyze the current market/industry environment, determine what is optimal and mobilize resources in the critical areas to achieve these goals.
- Simplify complex business problems/direction by drawing out the key themes, pulling together ideas, issues and observations into a new, simpler structure that is easy for others to understand.
- Develop new business solutions and/or leverage outside ideas to implement in own department or within the organization.
- Look to the future and improve performance by creating compelling, leading ideas, and gain commitment from senior management to test and implement new ideas.
- Provide leadership in determining and sharing the strategic objectives and direction of department, aligning people and building commitment towards achieving goals.

### **Thought Leader**

People in this role are effective strategists and forward thinkers who look to the future to find opportunities and direction. Forward thinkers, are also aware of what has happened in the recent past and what is happening now, both within and outside of OPB and how these occurrences have an impact on, and can be maximized by, OPB.

- Provide leadership in determining and sharing the strategic objectives and direction of OPB, aligning people and building commitment towards achieving organizational goals.
- Monitor external parties' impact on OPB's business and develop relationships with these parties that involve both information sharing and the potential for strategic alliances if/when appropriate.
- Sponsor and champion projects to adapt existing services for application in new and different environments, and generate new solutions to address strategic problems.
- Assess the organization's strengths and reputation within the marketplace to identify strategic opportunities to mold OPB's position and drive the financial objectives of the organization by using knowledge of trends in the industry.

## Change Leadership

Mobilizes change by participating in the change process and developing an understanding of the case for change. Solicits ideas from others for required changes. Holds self and others accountable for both effectively delivering their part of the work processes and continuously improving it. Works effectively within changing conditions.

### Service Leader

People in this role understand their roles in implementing change within the organization by understanding the case for change and how they can support the required changes.

- Are mindful of their own response to change.
- Are aware of changing situations and priorities.
- Incorporate organization and team changes into day-to-day activities.
- Engage in the development and identification of solutions to resolve issues.
- Support the implementation of new ideas, processes, and programs and provide feedback within department.
- Seeks out opportunities to make the change as effective as possible.

### Advisory and Professional Leader

People in this role seek opportunities to make a case for improvement, while advising clients throughout the change process to successfully implement the change.

- Throughout the change process are a trusted advisor for clients, displaying personal credibility and reliability, providing consistent and meaningful advice.
- Assess the organization for operational effectiveness and seek out opportunities to make the change effective and optimal.
- Identify, develop and manage change initiatives to address changing client needs and OPB's business needs.

### Leader of a Team

People in this role create an environment to engage employees in the change process and allow change to occur. They do this by putting a specific change plan in place and monitoring the team's progress against the action plan. They cultivate, support and repeat the reason for the change at appropriate opportunities.

- Support the process of resolving differences of opinion in an objective and constructive manner and take appropriate action if OPB principles/values are in conflict.
- Champion the need for flexibility and responsiveness within the organization.
- Solicit ideas and feedback from the team and foster an environment that embraces operational effectiveness and the implementation of new ideas.
- Take action to recognize the contributions of others and support their development to expand their roles and build capacity within the team.
- Are mindful of their own response to change, anticipate change resistance, and prepare for others response to change.
- Communicate organizational messages to team and address any impacts to the team.

### Leader of Leaders

People in this role actively consider the changes needed in their department from an internal and external perspective. They anticipate and prepare for others' reactions, adapting their words, actions and approach to respond to the audience's interests or concerns. They influence change in their department and monitor the outcomes of change initiatives.

- Champion the need for flexibility and responsiveness within the organization.
- Seek out opportunities to make the change effective and optimal within their department, continuously monitoring the effectiveness of change initiatives.
- Take the lead in establishing positive norms for individual and group behaviour; mentor others on the approach for delivering the best results.

- Anticipate change resistance and develop mitigation strategies and keep others focused on most critical aspects of the change.
- Knows when and who to bring in to support or champion the perspectives or recommendations being presented.
- Is accountable for ensuring that organizational messages are delivered throughout the department.

### Thought Leader

People in this role challenge the status quo with a vision for change by taking on difficult issues. They are aware of the challenges change will cause for the organization, however, focus on developing solutions to these challenges and visibly championing change.

- Are actively engaged in the change planning, gain an understanding of all considerations, voice concerns to peers, participate in the final decision(s) and champion change decision across the organization.
- Lead organizational change to respond to changing organization strategy or market environment.
- Demonstrate dedication to change by being completely unified through actions and words with peer leaders.
- Demonstrate ownership of challenging issues within the organization, addressing difficult issues as leaders of the organization.
- Build cohesion and commitment with diverse group of individuals.
- Consider external stakeholders' concerns and requirements in the change parameters and keep them appropriately abreast of changes at OPB and how it will impact them.
- Evaluate organizational responsiveness to change against performance measures.
- Assess the organization for operational effectiveness and identifies, develops and manages change projects to address needs.

## Collaborative Team Player

Develops effective cooperation and teamwork while participating in a group and working toward solutions that benefit OPB. Demonstrates respect for the opinions of others. Identifies and engages required parties with the appropriate degree of information and input.

### Service Leader

People in this role work within established teams and support their colleagues. They collaborate with others across teams and departments.

- Thrive on collaboration within and outside the team, encourage and participate in an open exchange of ideas and different points of view, and demonstrate respect for the opinions of others.
- Identify and push for creative solutions to achieve win-win outcomes that others can accept.
- Keep people informed and up-to-date.
- Openly share information, knowledge and own expertise with others when asked or when the need to share becomes obvious to enable them to accomplish group goals.

### Advisory and Professional Leader

People in this role openly share information, knowledge and own expertise to achieve individual and group goals.

- Identify and involve clients and stakeholders and consult widely to gain their commitment.
- Identify, engage, and seek opinions and views from required parties both within and outside the team, and listen attentively to them.
- Generate multiple alternatives to a problem to meet the needs of clients and always place the team agenda ahead of personal goals.
- Share information and own expertise with others to enable them to accomplish goals and cultivate relationships through sharing of information.

### Leader of a Team

People in this role facilitate and contribute to team effectiveness. They support their team in effective group interactions to achieve goals and attain results.

- Actively participate or lead, as appropriate, problem solving discussions and decision-making processes in alignment with departmental goals.
- Promote interaction and information exchange between teams in the organization.
- Ensure healthy and effective collaboration within their team and between teams.
- Coach others on how to ensure that the most appropriate individuals are involved in the discussions versus others who may be just informed of the results.
- Coach others on how to manage a group discussion to achieve the optimal mix of helpful, open dialogue and efficient time management and reach discussion objectives.

### Leader of Leaders

People in this role drive out additional opportunities for collaboration across business units and within own department, aiming for effective and efficient interactions that help achieve business objectives.

- Drive out additional opportunities for collaboration across business units, seeking to apply learnings from one group to another.
- Coach Leaders of a Team on effective collaboration techniques.
- Promote and ensure an organizational viewpoint in collaborative discussions.

### Thought Leader

People in this role collaborate across the organization and consider if industry collaboration would benefit the organization, in alignment with strategic objectives.

- Facilitate organization-wide collaboration efforts.
- Collaborate effectively and appropriately across the industry.
- Reinforce that effective collaboration is an OPB norm.
- Share expertise within the leadership team and mentor others within the organization.

## Drive for High Performance

Demonstrates commitment across all competencies to achieve a high standard of performance in an organization that empowers the workforce, recognizes team and individual achievement, and fosters an environment of ownership and accountability.

### Service Leader

People in this role provide services to clients (internal and external); they take full responsibility for the services they provide and strive to meet the client's expectations for quality, service and professionalism.

- Take the initiative to complete work on time, follow through and meet personal commitments to clients or other stakeholders and manage expectations.
- Proactively request and evaluate feedback from others (manager, co-workers, and internal and external clients) and, when appropriate, modify actions and behaviours in response to such feedback.
- Meet and exceed results in service delivery, contributing to the organization's high standards of performance.
- Plan and manage career, taking on challenging initiatives or roles.
- Learn from mistakes and how to solve them.

### Advisory and Professional Leader

People in this role focus on providing value-added service to clients (internal and external). To do this they take responsibility for their own performance, identifying ways to address obstacles, and pro-actively take steps to request feedback to raise their personal performance and the value provided by their business unit.

- Readily accept complete ownership and responsibility for issues, recognizing their role, identifying mistakes, problems and/or risk, and recommending options to address these before the issues become larger.
- Identify and address personal shortcomings and continually seek to raise personal standards of work.
- Lead meetings of clients or peers that achieve clear, successful outcomes.

### Leader of a Team

People in this role assess others' performance and focus on development and gap closure. They genuinely want others to be as good as they can be. They tell others what they are doing well and how they can build on their strengths and where they can improve. They focus on development and make very specific suggestions for improvement. They balance skill sets of the team and individuals to enable cross team success.

- Clarify expectations and accountabilities for team members in a manner that is clear, descriptive, and measurable.
- Provide honest, regular and documented feedback to employees, providing clear expectations around performance and competency.
- Recognize when employees exceed their accountabilities and hold them accountable when they are not achieved.
- Lead and motivate others towards accomplishing their work effectively.
- Encourage solid and high performers to stretch themselves by taking on challenging initiatives or roles.
- Set expectations across team(s) that align or exceed organization and industry level performance norms.
- Support employees in planning and managing their career and performance gaps.
- Provide coaching to develop talent.
- Allow others to learn from their mistakes and how to solve them.
- Build the team to embrace diverse perspectives and influence positive business results.
- Foster a high performance culture within the organization, lead and motivate team to achieve goals and cultivate leadership skills.
- Lead meetings of clients, peers, and/or subordinates that achieve clear, successful outcomes.
- Support direct reports in planning and managing their careers and the careers of their direct reports and gaps in performance.

### Leader of Leaders

People in this role encourage personal leadership and focus on the improvements achieved. They analyze others' potential to build independence and constantly adjust their approach away from instruction and towards discussion of options. They encourage members within a team to work together to solve a problem.

- Seek to develop opportunities to surface diverse perspectives on problems to enhance service delivery and leverage employee strengths.
- Provide clear expectations of roles and performance for managers and their teams and prioritize work in terms of business goals.
- Coach direct reports on how to provide candid feedback to high, solid, and low performing employees.
- Provide high and solid performers with opportunities to stretch their capabilities.
- Build high performing teams by bringing together the right resources, considering capabilities and development needs.
- Design optimal structure of teams and projects based on understanding of OPB strategy, structures, strengths and resources.

### Thought Leader

People in this role are talent champions and as such set the tone within the organization, driving and building talent. They nurture opportunities for independence and focus on mentoring. They stretch high potentials from across the organization taking into consideration resource alignment and learning opportunities.

- Develop opportunities for high performers to be developed for the next level within the organization, for mid-performers to optimize their performance and low performers to clearly understand what is required by the organization.
- Create a climate of openness and respect for diverse thoughts and opinions.
- Create and maintain an environment that encourages inspirational and courageous leadership.
- Develop high-performing teams with cross-functional focus and experience.
- Set the expectation that OPB will meet or exceed industry norms in individual productivity, performance management, and customer experience.
- Take ownership of OPB's 'talent pipeline' by being constantly aware of, and known to, talented individuals across the organization and the industry.
- Support the leadership team in planning and managing their careers providing honest, candid coaching regarding potential.

## Continuous Learning & Industry Knowledge

Demonstrates a commitment to professional and personal development by proactively seeking opportunities to develop new knowledge, skills and behaviours. Works to stay abreast of internal and external developments and acquires knowledge and skills needed to continually enhance their contribution to OPB and to their profession.

### Service Leader

People in this role are motivated to learn and to seek learning opportunities to develop themselves to perform effectively; to adapt to changes in the workplace; and to expand personal knowledge.

- Explore assumptions involved to ensure consistent and complete understanding of the internal and external environment.
- Seek opportunities to enhance work experience and apply learning gained from past learning opportunities.
- Express curiosity and seek to understand the “why” behind things by asking questions and gathering information.
- Value learning; are responsible for taking the initiative for their continuous growth and development by actively seeking out people, programs, other available resources and tools to help build their knowledge or understanding in their current role to address performance gaps and facilitate continuous growth and development.
- Seek out opportunities for learning in response to changing conditions and to enhance own professional knowledge.
- Use personal experiences as learning opportunities by reflecting on their own assumptions, methods, practices and approaches to identify areas of strength and current performance gaps.
- Make the personal investment in developing new knowledge base(s) and skill set(s) to reflect changing demands and opportunities.

### Advisory and Professional Leader

People in this role are motivated to identify and to pursue learning opportunities in their related field. They contribute new ideas or approaches to meet their objectives, and expand the team’s and the organization’s knowledge of internal and external environments.

- Demonstrate an understanding of major organization strategies as they relate to own service area.
- Proactively stay abreast of changes in the external environment; identify opportunities to transfer knowledge to others, apply new learning to their work, and to enhance the client’s experience.
- Are open to changes in approach as new information, ideas or solutions emerge.
- Talk to people in related fields to discover innovations or current trends in the field and act upon them, if appropriate.
- Look for opportunities to transfer their knowledge to others through a variety of learning approaches and translate new knowledge into new ways of behaving.
- Demonstrate a deep understanding of OPB, how it operates, and how its activities contribute to organizational goals.
- Have an understanding of OPB’s strategic process and how the organization’s activities fit into the external environment.

### Leader of a Team

People in this role have responsibility for supporting a continuous learning environment and for identifying and seeking out opportunities to develop themselves and support the learning and development of others to expand personal, team, and organizational knowledge. They also demonstrate their understanding by providing clear explanations for actions taken by the unit or organization relative to OPB’s overall strategies, trends in the industry, and the external environment.

- Seek out opportunities for learning in response to changing conditions, to enhance own professional knowledge and support employees’ quests to enhance their professional knowledge.
- Set learning expectations for self and team members and provide support for team to engage in continuous learning within department and throughout OPB.
- Support the transfer of learning before, during, and after a training program by discussing agreed upon learning goals, coaching the application of new learning, rewarding the application of new learning and following up with appropriate consequences when new behaviours are not applied as they should be.
- Coach team members and others within department to help them identify and leverage their strengths and develop and grow in areas where improvement is needed.

### Leader of Leaders

People in this role understand the external environment and are constantly reviewing, scanning, and analyzing trends in the business environment in order to stay aware of projected directions of the business and competitor advances relevant to their business unit. They use that information and their knowledge of OPB to identify areas of continuous development and improvement.

- Build and sustain a culture which values learning and development by seeking out learning opportunities for self and others, and by promoting continuous learning within their department.
- Develop themselves in response to changing conditions and play a key role in developing others.
- Participate in mentoring opportunities with employees to transfer their own knowledge and skills.
- Support a work environment where everyone owns their mistakes for the purposes of solving the mistake and learning from it.

### Thought Leader

In their role as industry leaders and talent champions these individuals seek to continually build their own understanding of what the industry expects and requires both for today and in the future. Using and sharing this knowledge, they drive and develop talent to align with the strategic and industry opportunities, positioning OPB as an industry leader.

- Use knowledge and expertise in industry and area of business to develop service offerings.
- Apply depth of knowledge to deliver solutions across OPB.
- Continuously update own professional knowledge and skills to ensure they stay current and promote this practice to all employees.
- Build and sustain a culture which values learning and development by seeking out learning opportunities for self and others, and promoting continuous learning at all levels of the organization.
- Promote organization-wide the value of learning from others within and outside the team, and coach the leadership team to ensure they are providing learning opportunities throughout the branch.
- Champion continuous learning as a strategic imperative.

## Client Focused

Sees things from internal and external clients' point of view and actively listens to them to gain a full understanding of their situation and meet their needs. Anticipates client challenges or problems and appropriately adapts to the client situation to deliver high quality services.

### Service Leader

People in this role provide services, support, advice and guidance to clients; build relationships; and represent OPB externally.

- Proactively identify clients and build strong relationships with clients based on personal integrity, trust and respect; continually improve relationships by understanding clients' needs.
- Actively listen, seek out, confirm and understand clients' needs and match them to appropriate solutions.
- Provide information and resolve client requests or issues/challenges in an accurate, timely manner; manage client expectations.
- Develop knowledge to better understand clients' situation, needs, problems or issues, and respond to client inquiries or identify another person or resource that can help the client.
- Recognize when changing client expectations require new approaches and is able to cope with uncertainty and incomplete information to quickly adapt or develop options for an effective resolution for the client.
- Proactively identify current, and anticipate emerging, client needs and investigate how these may be met.

### Advisory and Professional Leader

People in this role provide their expertise, advice, and guidance to serve OPB clients. They respond to challenges or problems to deliver high quality services.

- Build strong relationships with clients based on personal integrity, trust and respect; continually improve relationships by understanding their needs.
- Communicate openly with clients, keep them informed of progress and of any issues impacting them; communicate and keep commitments to the client.
- Meet client needs by acting professionally; apply a good working knowledge of own area of expertise to deliver high quality, accurate service; and adapt their communication to meet clients' varying levels of understanding.
- Develop the tools to build and maintain strong relationships with internal and external clients.
- Are forward-thinking and anticipate client needs by staying abreast of trends and developments in the external environment and anticipating how they will impact the department.

### Leader of a Team

People in this role promote opportunities for client focused behaviour within their teams and across departments and externally with a focus on effective and efficient client interactions to achieve business objectives. They model client focused behaviour and coach staff how to do same.

- Provide the tools to empower employees to build and maintain strong relationships with internal and external clients.
- Support employees by motivating, educating, training and identifying appropriate resources that will encourage new ways of thinking.
- Identify growth opportunities so employees can be proactive and resourceful.
- Recognize when changing client expectations require new approaches and inspire others to develop and implement new ideas and service delivery enhancements to benefit clients.

### **Leader of Leaders**

People in this role promote opportunities for client focused behaviour across branches and externally with a focus on effective and efficient client interactions to achieve business objectives.

- Build, define and communicate a culture of client service across branches, ensuring all employees understand that everyone they come into contact with at work is a client.
- Keep managers and employees informed of the corporate direction through effective, open and regular communication, providing them with both the information and the appropriate tools required to communicate with clients.

### **Thought Leader**

People in this role build strategic partnerships internally or externally, represent OPB externally, oversee the delivery of services and projects to achieve strategic objectives. They set the expectation that OPB will commit to meet or exceed client expectations for service delivery.

- Explore new opportunities to proactively identify and nurture new relationships and to develop strong partnerships based on trust and respect. Provide managers and employees with tools to empower them to build and maintain strong relationships with internal and external clients.
- Take a proactive approach to address the current state and then proactively work organization-wide to identify current and emerging client needs, and propose innovative strategies for how these may be met.
- Ensure effective, open, and regular communication between employees and clients on the progress of current work and any other relevant issues, and take personal responsibility for communicating with clients.