

CA Capability+

Platform User Guide
Version 2.0



Contents

Introduction.....	3
The <i>CA Capability+</i> assessment platform	3
Purpose of this document	3
The Assessment	4
Begin the assessment.....	4
Complete the assessment	5
The Results.....	6
View report online	6
Scoring.....	7
Interpreting your results.....	8
Build a development plan	9
Access your development plan and learning recommendations.....	9
Compare capability requirements of other roles	10
The CA Capability Model	13
Role Clusters	15

Introduction

This document guides Chartered Accountants through the process of using the CA Capability+ platform for their professional development. If you are wanting to use the platform, then this guide is for you.

The CA Capability+ assessment platform

Chartered Accountants Australia and New Zealand (CA ANZ) is proactively shaping the profession of the future and supporting our valued members to navigate the increasingly turbulent world of work. As the work being performed by accountants continues to evolve and change, so too does the capabilities required to succeed in the future workforce.

Derived through extensive research across global frameworks and Chartered Accountant professional bodies forming the Global Accounting Alliance, we have designed the CA Capability Model (CACM), a framework that captures a set of capabilities accountants will need to develop in order to show their full potential and sustain a career in an increasingly disrupted labour market.

The CA Capability+ platform gives you the opportunity to assess yourself against these capabilities and puts you in control of your professional development.

On the platform you can assess your own capabilities against the capabilities required for the most common roles across our membership base. These assessments provide an opportunity for you to self-reflect and consider your strengths and weaknesses with the aim of gaining insight to assist your development.

Purpose of this document

The CA Capability+ User Guide is intended to provide you with all the necessary information to use the CA Capability+ platform. It includes detailed step-by-step instructions on how to access the platform, complete an assessment and view results, as well as background and contextual information about the CA Capability Model (CACM) and role profiles available in the platform.

For more information on CA Capability+ and a demonstration of the tool in action, check out our explainer video or visit our [website](#).

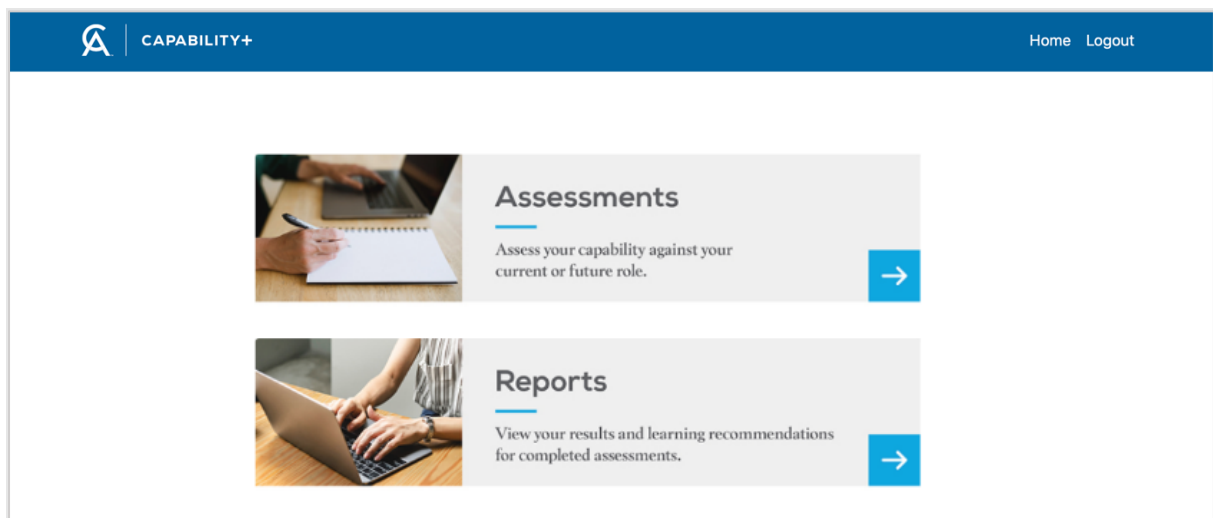


The Assessment

This chapter explains how you can complete your CA Capability+ assessment.

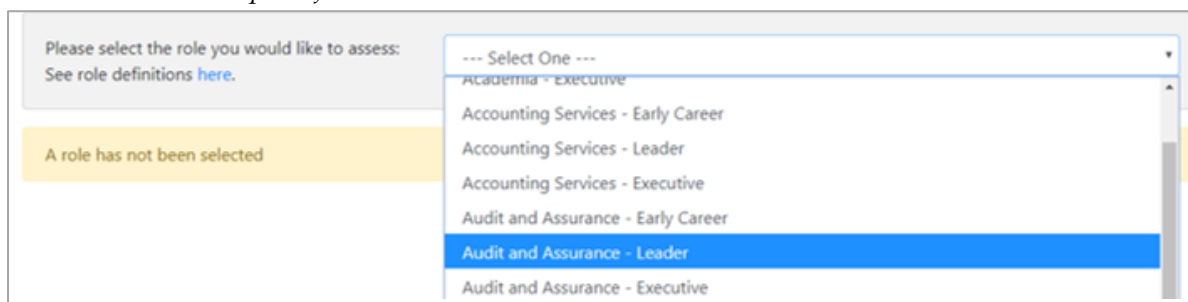
Begin the assessment

To begin the capability assessment, click on the **Assessments** tile. This tile will launch the assessment menu.



1. Use the drop-down menu to select the role you would like to assess yourself against. This can be based on your current role or any other role you would like to use as a benchmark. If you are unsure which role to select, click on **See Role Cluster Definitions** to access detailed descriptions.

***Note:** For more information on how these roles were identified and constructed, please refer to the Role Clusters chapter of this User Guide.*



Please select the role you would like to assess: --- Select One --- ?
 See role definitions [here](#).


My Assessment
Audit and Assurance - Leader

Date: 19/10/2020
 Respond as: Job Holder
 Status: 0/42 ●

[Launch](#)

The role cluster you select determines which assessment you are going to complete. Each role cluster has been allocated a different set of priority capabilities at the relevant proficiency level.

- Once you have selected a role, a new 'My Assessment' tile for that role will appear. Select **Launch** to access the assessment.

Throughout the platform you can find a blue question mark icon . Useful information to help you navigate through the tool can be accessed by clicking on that icon.

Complete the assessment

- To commence your assessment, review the welcome message and select **Start**.

On each page you will be presented with a number of statements relevant to one of the core capabilities for the role cluster you are assessing yourself against. The relevant capability as well as a brief descriptor are listed at the top of the screen.

A | CAPABILITY+ Home Change Password Logout

Rate your confidence in your ability to execute the following activities ?

Communication

Clearly and succinctly conveys information and ideas to individuals and groups in a variety of situations in a focused, empathetic, and compelling way that shapes others' thoughts and actions.

	No confidence	Low confidence	Moderate confidence	High confidence	Complete confidence	N/A
I communicate information and ideas clearly and concisely appropriate to the audience	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I choose an appropriate communication medium for the message and audience	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I show empathy and understanding during interpersonal conflict or challenges	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I listen actively and determine people's needs with empathy and accuracy	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I promote and gain support for insights or recommendations using succinct and logical messaging	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I use verbal and non-verbal communication effectively	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

<< Save & Previous
Page 3 of 8
Save & Next >>

2. Rate your confidence in your ability to execute the activities referenced in each statement by selecting one of the five options (No confidence, Low confidence, Moderate confidence, High confidence and Complete confidence). If you feel that some statements are not relevant in the context of your job role, use the N/A option.
3. Once you have rated your confidence for each statement, click **Save & Next** to continue. The assessment will approximately take 15 minutes to complete. If you don't have time to complete the full assessment, this also ensures that ratings you have provided are saved and statements don't need to be re-rated.
4. Repeat steps 2 and 3 on the following pages. You can track your progress and the number of pages that need to be completed on the bottom of each page.
5. Once you have rated all statements, select **OK** to close the assessment and return to the landing page.

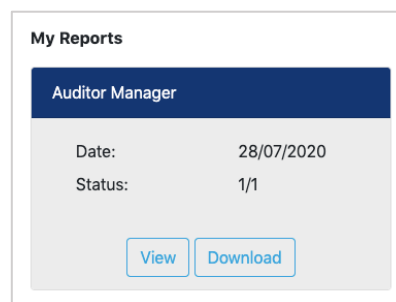
The Results

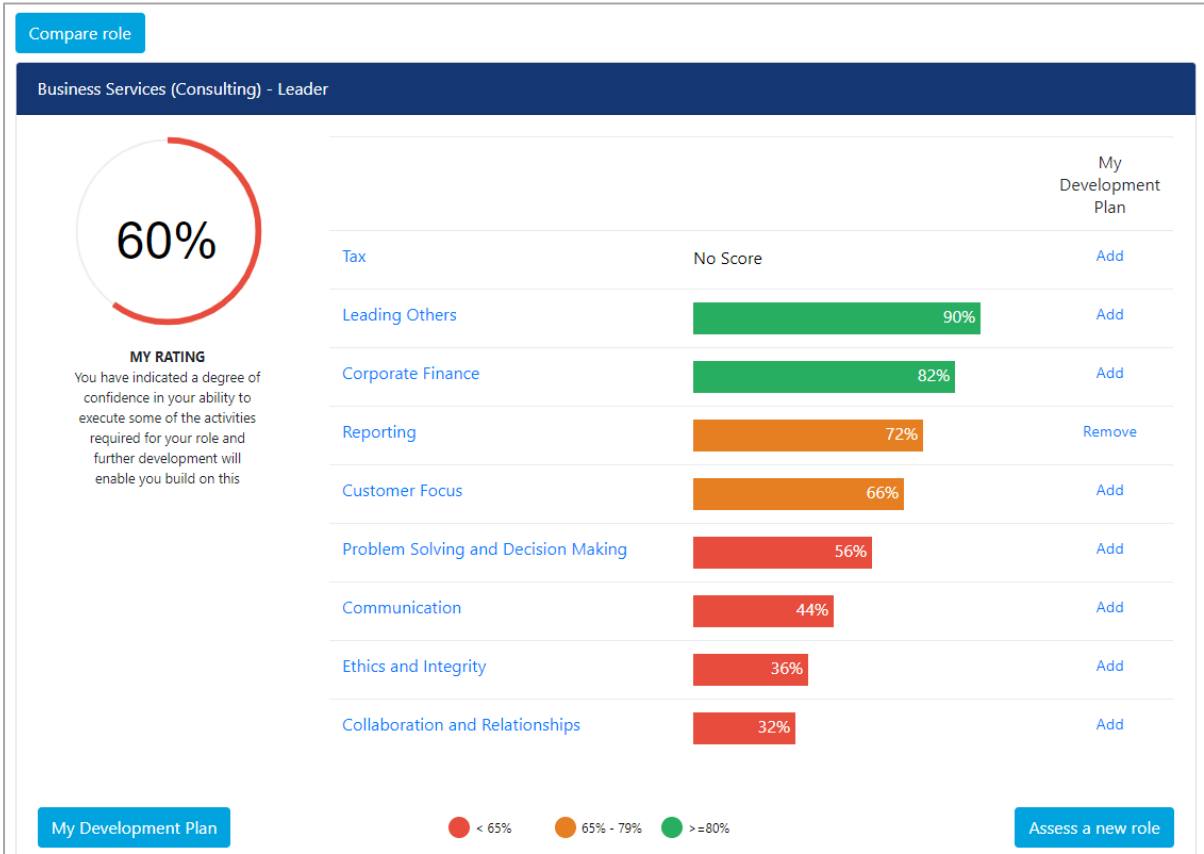
Once you have completed your assessment you can immediately look at your results. The interactive online report allows you to view your results, build a development plan and access learning recommendations, as well as compare capability requirements of other roles. This chapter will guide you through the online report.

View report online

To view your capability assessment results, click on the **Reports** tile on the home screen. This tile will direct you to all available assessment reports. Click **View** to view an interactive version of your report online or click **Download** to download a pdf version of your report.

In the interactive online report, you'll see a summary of your results on a chart including an overall rating for the Role Cluster you assessed for.





Scoring

The **My Rating** score is a total average of all of the ratings provided for every capability within the assessment. This gives a general overall indication of your confidence compared to the requirements of the role.

Scores for each capability on the bar chart are calculated based on your overall rating of confidence considering each capability statement.



Your results are based on your self-perception of your ability to execute certain activities confidently. The CA Capability assessment uses a confidence rating scale as someone's perception of their own ability is empirically closely linked to actual ability. It is however possible that your perception is different to your actual abilities. Self-assessments like those within the CA Capability+ platform provide an opportunity for you to self-reflect and consider your strengths and weaknesses with the aim of gaining insight to assist your development.

Interpreting your results

Overall scores for individual capabilities can range from 0% to 100% and are correlated to the overall ratings you provided in the assessment.

The bars on the chart are coloured Green, Amber or Red based on the legend below and to assist you in determining where you may wish to focus your development.



A score of 100% would indicate you have complete confidence in your ability to execute the requirements for that capability **at the proficiency level that is relevant to the career stage of your assessment.**

Role Career Stage	Relevant capability proficiency level
Early Career	Foundation
Leader	Intermediate
Executive	Advanced

To complete an assessment for a higher capability proficiency level, use the **Assess a new role** button below the results chart and select the relevant role from the drop down to complete the new assessment against the higher rated capabilities.

You can click on any capability name (blue hyperlink) to drill into your results and see raw scores for individual statements. The raw scores here directly reflect the option selected in the assessment with ratings being attributed as per the below table:

Assessment rating option	Raw score attributed
N/A	0
No confidence	1
Low confidence	2
Moderate confidence	3
High confidence	4
Complete confidence	5

Build a development plan

Once you have identified capabilities that you'd like to further develop, the *CA Capability+* platform allows you to create a development plan which is where you can browse the recommended learning and resources specific to those areas.

Creating a development plan

1. To add a capability to your development plan, click on the **Add** button next to the corresponding capability bar chart in the table. You will then be prompted by the system to confirm adding that capability to your Development Plan.
2. Once you have added a capability to the Development Plan, you will be able to browse the learning and resource recommendations that target that capability at the relevant proficiency level to the role you assessed.
3. Once you have added a capability to your development plan, a **Remove** button will replace the **Add** button. If you wish to remove a capability from your development plan and stop reviewing learning and resources, simply select **Remove** (this can be added again at any time).

Access your development plan and learning recommendations

Within the platform you can view learning recommendations for each capability that you have added to your Development Plan.

1. Click on the **My Development Plan** button underneath the results chart to access your plan. A curated set of tailored eStore and LinkedIn Learning content recommendations for each capability in your plan will be listed in respective tabs.

The screenshot displays a user interface for 'My Development Plan' with a 'Leading Others' tab selected. It features three recommendation cards:

- How To Manage Difficult Conversations**: An eSTORE recommendation, Intermediate level, Recorded webinar, Up to 3 CPD hours. Includes a 'GO TO eSTORE' button.
- How To Coach, Manage And Mentor Others**: An eSTORE recommendation, Intermediate level, Webinar, Up to 1 CPD hours. Includes a 'GO TO eSTORE' button.
- Leading the Organization Monthly**: A LinkedIn Learning recommendation, Intermediate level, Up to 2 CPD hours. Includes a 'VISIT LINKEDIN LEARNING' button.

- Click on the tile for the particular learning recommendation you are interested in to be directed straight to the CA Education Store or LinkedIn Learning.

Note: The platform will provide you with learning and resource recommendations at the proficiency level equal to the role cluster you have assessed for. As applied to the capability mapping to roles that informs the assessment process detailed above, here is a mapping of role career stages and corresponding learning recommendation proficiency levels:

Role Career Stage	Relevant capability proficiency level
Early Career	Foundation
Leader	Intermediate
Executive	Advanced

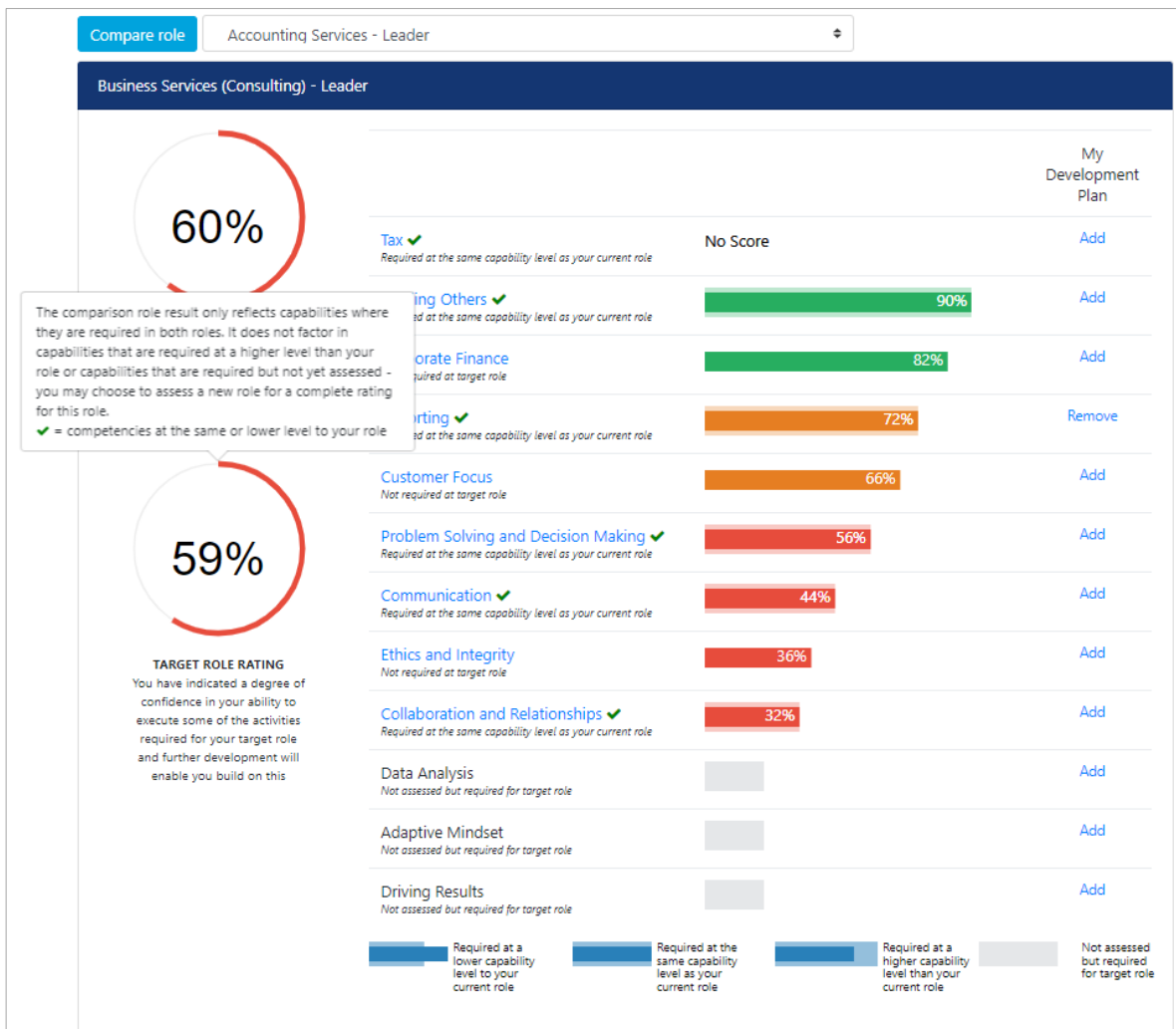
Compare capability requirements of other roles

The CA *Capability+* platform lets you compare your capabilities to the capabilities required for other role clusters. Once you have assessed yourself against your current role, you might, for example, want to compare your capabilities to the requirements for a role you aspire to take on. The ability to compare allows you to identify development areas to focus on when pursuing a different role, and also to identify other potential career opportunities that exist where roles share a similar capability profile to yours.

To undertake a comparison, select the **Compare Role** button at the top of screen and choose the role cluster you would like to compare from the drop-down menu.

The screenshot shows the CA *Capability+* platform interface. At the top, there is a navigation bar with the CA logo, 'CAPABILITY+', and links for 'Home', 'Change Password', and 'Logout'. Below the navigation bar, there is a 'Compare role' button and a dropdown menu. The dropdown menu is open, showing a list of role clusters with 'Accounting Services - Leader' selected. To the right of the dropdown menu, there is a 'My Development Plan' section. This section contains a list of items, each with a progress bar and an 'Add' or 'Remove' button. The progress bars show percentages: 90%, 82%, 72%, and 66%. The '72%' bar has a 'Remove' button, while the others have 'Add' buttons.

In comparison mode your report view changes. An additional overall **Comparison Role Rating** appears below your original rating, and the results chart animates to include the capabilities that are also required in the comparison role cluster.



The overall comparison role rating

In comparison mode, the additional **Comparison Role Rating** that appears underneath **My Rating** shows a total average of the ratings provided within your assessment where there are common capabilities required in both the role you assessed and the comparison role. This gives a general overall indication of your confidence compared to the requirements of the comparison role. These capabilities are marked with a green tick on the results table so you can see which scores contribute to the **Comparison Role Rating**.

This rating **does not** factor in capabilities that are required at a higher level than your role or capabilities that are required but not yet assessed. In other words, this may not necessarily be a complete picture of how your capabilities match to all of those required in this

comparison. For a complete rating against the comparison role, you may choose to **Assess a new role** using the button below the results chart.

The results chart in comparison mode

In comparison mode, the results chart animates with an additional line of information added below each capability name to reflect their status in the comparison. Options for this (also included in the legend below) include:

- Required at a lower capability level to your current role
- Required at the same capability level to your current role
- Required at a higher capability level than your current role
- Not assessed but required for your comparison role
- Not required for comparison role

This additional information can be used to help determine how your capability profile compares to other role clusters and where you might wish to focus your development. For a complete rating against the comparison role cluster (or any other role cluster from the menu), you may choose to **Assess a new role** using the button below the results chart.

The CA Capability Model

The CA Capability+ assessment is based on the CA Capability Model (CACM). This chapter provides high level information on the model and links to resources, so you can explore the model in more detail.

The CA Capability+ assessment is based on the CA Capability Model (CACM) which has been designed and developed to help shape the future direction of the accounting profession.

Guided by extensive research, the model identifies the technical and non-technical personal, business and leadership capabilities of a Chartered Accountant at different stages of their career, from early-career through to executive level.

It is structured around four 'Domains': – Business (business context), Leadership (people and future), Personal (mindset and intellect) and Technical (professional expertise).

These represent the key capabilities an accountant of the future will require to be flexible, innovative, adaptive and responsive to future challenges.

The CA capability model is pictured below.



^ Six ESSENTIAL non-technical capabilities required for future employability of a professional accountant irrespective of their level of work, career stage, location or job role. The other non-technical capabilities are critical but will vary according to the job role.

The four domains answer the following questions



The first three capability domains complement existing technical skills, knowledge and experience that accountants will need in the future.

The domains also consider emotions and cognitive factors to provide an insight into the skills, knowledge, personal attributes and mindsets that underpin the professional capacity required for performance in a job. These capabilities should be continuously developed across an accountant's career.

The Capability Model provides a scaffold to compare against the tertiary training available for prospective accountants, specifically the graduate attributes or learning outcomes that are a regulatory requirement.

In the past, many university and professional post-graduate courses emphasised technical knowledge and theory over personal attributes and emotional intelligence. Currently, many tertiary providers are considering these capabilities but curricula are changing slowly.

As a professional body, CA ANZ sought to ensure in developing the Capability Model that its focus was on how standards being set reflected what was required by employers and the profession. More information regarding the model can be found on the [CA ANZ website](#).

Role Clusters

Capabilities identified as essential in the future accounting profession have been allocated to Role Clusters that drive the assessment within CA Capability+. This chapter explains the approach we have taken to develop the clusters and list all role clusters and indicative corresponding job titles currently available in CA Capability+.

We understand that capability requirements vary by specialisation and career stage, which is why we have conducted extensive research to identify particular sets of capabilities most relevant for specific roles.

Using data gathered through CA ANZ's annual remuneration survey, we identified the most common roles across our membership base.

These roles were validated through further research with our member insight panel, assigned to particular career levels and allocated the most relevant CACM capabilities at a level most appropriate for the role.

We then conducted analysis around which of these specific jobs shared common capability profiles to other roles and created the CA Capability+ Role Clusters.

The following pages provide an overview of all Role Clusters you can select to assess and compare to within the CA Capability+ platform. This table includes indicative job titles that may fit within each Role Cluster to assist in determining the most appropriate option for each individual.

This resource is linked within the platform at the stage of selecting a new assessment.

CA Capability+ Role Cluster Definitions

The CA Capability+ assessment gives you the opportunity to self-reflect on your strengths and weaknesses with the aim of gaining insights to assist your development. The assessment allows you to assess your own capabilities against a set of critical capabilities required for common Role Clusters.

The Role Clusters and essential capabilities have been isolated through extensive research using the CA Capability Model to determine the most important capabilities for common accounting roles in Australia and New Zealand. The Role Clusters outlined below represent roles that are related purely through their underpinning capabilities and based on three key career stages:

Early Career, Leader and Executive.

In completing the assessment, you will determine not only how well your current capabilities fit one role, but the other roles within the cluster that require the same mix of capabilities. Equally, you can profile yourself against a desired next-step career role cluster enabling you to see other roles that become career development opportunities when the same capabilities are acquired.

Use the table below to assist you in selecting the most appropriate Role Cluster for your CA Capability+ assessment where you should look to identify alignment with the *cluster name*, *career stage*, and *indicative job roles* to help make your selection.

	Early Career	Leader	Executive
Academia		<ul style="list-style-type: none"> Junior Lecturer (includes Tutor, higher education and technical and vocational trainer) Academic Lecturer (Accounting, tax or business studies) 	<ul style="list-style-type: none"> Academic Senior Lecturer – Accounting, Tax and/or Business Studies Academic Professor (Head of School/Faculty)
Accounting services	<ul style="list-style-type: none"> Assistant Accountant (Accounts Clerk, Accounts Payable Clerk) Accountant (General – Private Practice, Sole Practitioner) 	<ul style="list-style-type: none"> Accountant (General – Private Practice, Sole Practitioner) Senior accountant Accounting Manager Cost Accountant 	<ul style="list-style-type: none"> Group Financial Accountant Group Accountant
Audit and Assurance	<ul style="list-style-type: none"> Analyst (intern) Junior Auditor (External or Internal Audit Office) Auditor (External/Audit Office) Auditor (Internal/Audit Office) 	<ul style="list-style-type: none"> Senior Auditor (External) Senior Auditor (Internal) Audit Manager (Internal) Audit manager (External) Forensic Accountant Investigator Senior Manager Associate Director Senior Forensic Accountant 	<ul style="list-style-type: none"> Investigations Manager Audit Partner Audit signing partner Senior Director Managing Director Senior Partner
Business Services (Consulting)	<ul style="list-style-type: none"> Consultant Business Services Accountant 	<ul style="list-style-type: none"> Senior Consultant (Principal Consultant) Finance Business Partner Business Services Manager 	<ul style="list-style-type: none"> Client Manager (Account Manager) Partner (Public Practice, Principal, Partner: Tax, Audit, Audit Signing Partner, Finance, Consulting, Business Advisory)

	Early Career	Leader	Executive
Financial Advice and Reporting	<ul style="list-style-type: none"> Financial Clerk (Accounts Clerk, Financial Administration Officer) Analyst (Budget/ Financial) Paraplanner 	<ul style="list-style-type: none"> Financial Accountant Contract Accountant (Contract Manager) Financial Planner (Financial Planning Advisor, Business Planning Advisor, Wealth Manager) Financial Adviser Business Advisor Financial Manager Finance Officer Business Analyst Finance reporting Manager Senior Analyst (Senior Business Analyst) Commercial Analyst 	<ul style="list-style-type: none"> CFO Group CFO Finance Director Financial Director Group Finance Director Head of Finance Financial Controller Group Financial Controller Group Financial Accountant Senior Finance Manager Financial Accountant Manager Commercial Finance Manager (Commercial Manager) Senior Commercial Analyst Group Finance Manager
Financial Management	<ul style="list-style-type: none"> Assistant Financial Manager Assistant Management Accountant Financial Planning and Analysis (FP&A) Analyst 	<ul style="list-style-type: none"> Management Accountant (Accounting Manager) Financial Business Partner Finance and Administration Manager Business Manager Financial Planning and Analysis (FP&A) Manager 	<ul style="list-style-type: none"> Head of Financial Planning and Analysis Operations Manager Executive Manager
Governance & Executive Management		<ul style="list-style-type: none"> Risk Officer Governance & Financial Risk Manager Risk Analyst Account Director 	<ul style="list-style-type: none"> Director (Company, Board, Executive Director, Non-Executive Director) Chairman/Chairperson Chief Operations Officer (COO or Director of Operations, Operations Director, or Chief Operating Officer) Company Secretary (Corporate Secretary) Vice President President Chief Executive Officer (CEO) Managing Director
Non-technical roles	<i>This cluster is appropriate where you are unable to find another role cluster that closely aligns with your current role. Selecting this option will lead to an assessment of the most critical non-technical capabilities for the future accountant at the relevant proficiency level for the career stage selected.</i>		
Public Services	<ul style="list-style-type: none"> Junior Finance Officer Grants Fund Manager General Accountant General Finance Management Accountant Taxation Accountant Budget Officer Pricing/Cost Analyst 	<ul style="list-style-type: none"> Local Government Management Accountant Government Tax Auditor Fund Manager Fund Accountant Financial Analyst, Policy and Planning Procurement Policy Financial Investment Manager Senior Finance Director (Small Gov CFO) Internal/External Budget Manager Financial Business Partner 	<ul style="list-style-type: none"> Chief Finance Officer (Gov) Auditor Generals Deputy Auditor Generals Assistant Auditor Generals CEO, Secretary or Managing Director Chair/Board Member Deputy Secretary (assistant heads of agency)

	Early Career	Leader	Executive
Taxation	<ul style="list-style-type: none"> • Tax Accountant • Tax Consultant • Tax Agent • Tax Adviser 	<ul style="list-style-type: none"> • Tax Manager • Senior Tax Manager • Senior Tax Consultant • Tax Specialist 	<ul style="list-style-type: none"> • Group Tax Manager • Tax Director • Tax Partner
Technology & Digital	<ul style="list-style-type: none"> • Systems Accountant 	<ul style="list-style-type: none"> • Project Accountant (Project Finance/Budget Manager) • Systems Accounting - Team Leader • Financial Transformation Manager • Start-up Entrepreneur • Portfolio Manager • Business Intelligence Leader 	<ul style="list-style-type: none"> • Chief Executive Financial Information Systems
Treasury & Banking Services	<ul style="list-style-type: none"> • Banking and Financial Clerk • Treasury Analyst • Treasury Assistant • Treasury Accountant 	<ul style="list-style-type: none"> • Senior Treasury Analyst • Treasury Manager • Finance & Commercial Loans Manager • Fund Accountant • Fund Manager 	<ul style="list-style-type: none"> • Head of Corporate Finance • Head of Treasury • Group Treasury Manager • Senior Finance & Commercial Loans Manager • Corporate Treasurer

Career Stage and Proficiency Level Descriptions

Early Career (Team Player)

- Hands-on employee, could work in one of many roles
- Role likely to mix depth and breadth, e.g. working on multiple client engagements or projects, supporting a business unit, or performing one function for several business units
- Unlikely to have formal direct reports but may supervise a small team and informally lead or develop others
- Often focussed on the short to medium term and takes direction rather than setting it
- Relationships likely to extend beyond the immediate team to internal cross-functional partnering and interacting with external advisors or client teams

Individuals who assess Role Clusters at this Career Stage will receive learning and resource recommendations at **Foundation** level

Leader

- May manage a team, function, division or business unit and often has formal direct reports
- Works across all areas of the finance team or specialist technical areas
- Multi-tasks between a portfolio of clients or the needs of several business stakeholders, plus operational and people management responsibilities – resource allocation, delegation, training needs, recruitment, managing the financial performance of the team or division, and/or business development activity
- Balances short term operational needs with the longer-term direction of the organisation, may provide input to the strategic plan, work on business transformation projects, transactions
- Works with leaders of the organisation to drive financial performance, rigour and compliance and maintains relationships with relevant external advisors

Individuals who assess Role Clusters at this Career Stage will receive learning and resource recommendations at **Intermediate** level

Executive

- Experienced leader responsible for the governance of an organisation, or advising others at this level
- Work with other leaders and the board to drive the strategic direction of the organisation, influencing its long-term direction
- Internal and external role model, example of integrity and ethical behaviours
- Drives compliance in accordance with the business charter, ensuring communication of the strategic plan and empowering others to deliver
- Maintains strong network of senior professionals

Individuals who assess Role Clusters at this Career Stage will receive learning and resource recommendations at **Advanced** level