

Personal effectiveness competencies

You need to demonstrate competence in ALL of the seven personal effectiveness competencies.

Competency	You can	Examples to demonstrate competency
Use of information technology	<ul style="list-style-type: none"> • Access information from the internet • Communicate and send information via the internet • Use a variety of software applications 	<ul style="list-style-type: none"> • Gather and store information from the internet • Send and receive emails • Create and amend spreadsheets • Create and amend documents • Design and use standard templates • Enter, manipulate and modify data/other information
Communicate with colleagues and/or clients in person	<ul style="list-style-type: none"> • Deliver relevant information clearly and logically • Listen attentively without making unnecessary interruptions • Ask sensible questions at the appropriate time • Answer questions accurately and helpfully • Treat colleagues and/or clients courteously and with respect 	<ul style="list-style-type: none"> • Give a briefing to/receive a briefing from a colleague/client • Deliver a short presentation • Participate in a structured meeting
Present information in written form	<ul style="list-style-type: none"> • Identify information that needs to be communicated • Choose the most appropriate form of written communication • Communicate effectively following appropriate conventions e.g. spelling, grammar, house style, avoidance of jargon or slang • Deliver relevant information clearly and logically 	<ul style="list-style-type: none"> • Draft letters, emails and file notes • Produce analysis schedules • Complete work programmes • Prepare reports
Set targets, prioritise and organise work	<ul style="list-style-type: none"> • Plan work and prioritise tasks • Make and keep deadlines • Monitor own time management 	<ul style="list-style-type: none"> • Organise own workload • Communicate progress on assignments to senior colleagues • Complete work within agreed timescales

Competency	You can	Examples to demonstrate competency
Work constructively with colleagues	<ul style="list-style-type: none"> • Work co-operatively • Share knowledge and information with colleagues • Appreciate the needs and workload of colleagues 	<ul style="list-style-type: none"> • Effective team working to improve efficiency • Collaborate with others to produce better quality outcomes • Help and support junior staff
Develop and maintain ethical working relationships	<ul style="list-style-type: none"> • Understand and appreciate the ethical dimension of a situation • Ensure confidentiality of information • Demonstrate professional integrity 	<ul style="list-style-type: none"> • Identify ethical issues arising • Refer possible problems to senior colleagues • Deal with confidential information appropriately • Develop open, honest and straightforward working relations
Demonstrate a commitment to own personal and professional development	<ul style="list-style-type: none"> • Assess your current level of competence • Set yourself objectives • Take responsibility for your own personal and professional development 	<ul style="list-style-type: none"> • Attend an appraisal and discuss your objectives • Engage with the AAT's CPD cycle • Identify areas of personal and professional development required • Undertake relevant CPD activities

Technical competency

You need to demonstrate competence in just ONE of the following technical competencies.

Competency	You can	Examples to demonstrate competency
Financial Accounting	<ul style="list-style-type: none"> Collect and process information for the preparation of accounts/financial statements Ensure this information is complete and accurate Identify and resolve any unusual items Prepare a trial balance Prepare and present accounts/financial statements in an appropriate format and in accordance with the applicable reporting framework Prepare supporting information to the accounts/financial statements as appropriate 	<ul style="list-style-type: none"> Maintain a sales ledger, purchase ledger or cash book Prepare bank and other reconciliations Prepare a trial balance Prepare accounts/financial statements Prepare supporting schedules/notes to the accounts/financial statements
Management Accounting	<ul style="list-style-type: none"> Collect and process information for the preparation of management account Ensure this information is complete and accurate Identify and resolve any unusual items Prepare and present information for management purposes Provide supporting explanations as required 	<ul style="list-style-type: none"> Gather management accounting data/information Maintain systems for recording management accounting information Gather and collate market/industry information Prepare regular management accounts Prepare supporting schedules to the management reporting package Carry out analysis of significant movements and trends
Cost Accounting	<ul style="list-style-type: none"> Identify the short term and long term costs of products and/or services Analyse differences between estimated and actual costs Provide explanations for significant differences arising Prepare budgets to monitor revenue Prepare budgets to control expenditure 	<ul style="list-style-type: none"> Prepare costings for products and/or services Carry out analysis of major cost variances Give feedback on the results of variance analysis Prepare new and/or update existing revenue budgets Prepare new and/or update existing cost budgets Prepare new and/or update existing cash flow forecasts

Competency	You can	Examples to demonstrate competency
Taxation	<ul style="list-style-type: none"> • Collect and process information for the preparation of either direct or indirect tax returns • Ensure this information is complete and accurate • Identify and resolve any unusual items • Prepare either direct or indirect tax returns • Provide supporting information as required 	<ul style="list-style-type: none"> • Gather data/information for tax returns • Maintain systems of recording data/information for tax returns • Prepare appropriate analysis schedules • Prepare direct/indirect tax returns • Prepare supporting schedules • Communicate with the tax authorities on routine matters
Payroll	<ul style="list-style-type: none"> • Collect and process information for payroll purposes • Ensure this information is complete and accurate • Identify and resolve any unusual items • Prepare payroll returns and other payroll documents • Provide any supporting explanations as required 	<ul style="list-style-type: none"> • Gather data/information for payroll purposes • Maintain systems of recording data/information for payroll purposes • Carry out routine payroll reconciliations • Prepare payroll returns and other payroll documents • Prepare supporting schedules • Liaise with the tax authorities on routine matters relating to payroll
Audit	<ul style="list-style-type: none"> • Gather evidence by following audit/review programme instructions • Resolve any problems by communicating and discussing issues with senior colleagues • Plan and manage resources to enable the audit/internal review to be completed in a timely and cost effective way • Identify appropriate audit/review procedures for inclusion in audit/review programmes • Monitor work performed against audit/review programmes to ensure that objectives are met 	<ul style="list-style-type: none"> • Follow audit/review programme instructions • Prepare working papers that document and evaluate audit/review work performed • Discuss and resolve issues arising during the audit/internal review with senior colleagues • Allocate work to junior staff according to their knowledge and experience • Monitor time and cost budgets to ensure they are adhered to • Design/tailor audit/review programmes • Review work performed to ensure that objectives are met

Competency	You can	Examples to demonstrate competency
Credit Control	<ul style="list-style-type: none"> • Ensure that customers are offered credit appropriate to their level of credit worthiness • Ensure that customers comply with their agreed credit limits and payment plans • Take necessary action when credit agreements are not adhered to 	<ul style="list-style-type: none"> • Perform credit control checks on new customers • Monitor customer payment patterns • Compile evidence of late payments • Highlight issues arising to senior colleagues • Implement appropriate action against late-paying customers
Teaching	<ul style="list-style-type: none"> • Effectively plan and manage a programme of study for learners working towards one or more of the learning and assessment areas in the AAT Accounting Qualification • Demonstrate a high knowledge and understanding of the LAA being taught • Use a range of teaching strategies and resources to motivate learners and ensure that all the course content is appropriately covered within the time available • Achieve a satisfactory measure of success in terms of the number of learners being assessed as competent at the end of the course 	<ul style="list-style-type: none"> • Deliver a course programme that includes teaching and revision elements • Prepare high quality learning materials e.g. slides, notes and hand-outs that are both accurate and engaging • Receive generally good feedback from course participants • Record overall success rates for learners' performance in the assessment that are at least in line with expectations