

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 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"> 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