

# CHARTERED MANAGER

## Written Submission Template

### Full Assessment - Written Submission

#### Overview

Chartered Manager is a practically-based assessment that reviews personal skills and expertise in leading people and managing change, and how these skills underpin continually effective performance and make a positive contribution to your organisation.

Your registration for Chartered Manager remains current for a 12-month period, fees paid are non-refundable. On average it takes approximately 10 hours to present a written submission, and most applications (including assessment) are completed within 3 months.

#### Your role as the Candidate - what you have to do

- Review all guidance and submission questions in this document - to ensure you focus on what is required;
- Complete and return a full draft submission (where possible within 28 days), for Assessor review;
- Respond to any contact from Assessor to keep your application and assessment progressing
- Provide any additional information if requested by your Advisor-Assessor at any point during assessment;
- Undertake a telephone interview with your Assessor to confirm you meet the Chartered Manager standards;
- The telephone interview will last approximately 1 hour - ideally you should be in an area free from distraction;
- Please give at least 24 hours notice to your assessor if you need to alter the day/time of your interview - like all managers our assessors have busy schedules so last minute cancellations can impact on assessment progress

#### The role of the Advisor/Assessor

Your Advisor/Assessor ensures you understand the requirements for completing Chartered Manager, that you have supplied sufficient information for assessment, and that your claims are validated.

If the Advisor/Assessor feels your draft submission does not meet the award criteria you will be given feedback in order to amend and resubmit. If there are gaps in that resubmission the Advisor will provide further feedback and a final opportunity for you to amend and resubmit before referring your application.

The Assessor ensures Chartered Manager standards are met, reviewing your submission to identify:

- Your professional approach in applying your skills/expertise in leading people and managing change;
  - How these skills underpin continually effective performance with positive organisation contribution;
  - Your credible examples and measures of success;
  - What you have learned from these achievements and your plans for continuing development;
  - That your written claims and verbal discussions are coherent and supported/validated by corroboration.
- Reserving the right to explore these further as necessary.

The Assessor will either recommend you be awarded Chartered Manager status or provide you with feedback on what additional information/activity would be required to achieve the award.

There is an appeals process for exceptional circumstances where a candidate is not awarded Chartered Manager. Details can be requested from the Chartered Manager team [cmgr@managers.org.uk](mailto:cmgr@managers.org.uk)

# Your Submission

Completing your submission will enable you to establish how, within the last 18 months, you have:

1. Demonstrated consistent effective performance within your own or a client organisation
2. Used a professional and ethical approach to applying your management skills
3. Learned from your experiences, with commitment to future Continuing Professional Development

In submitting a completed application you are confirming you operate in a professional and ethical manner in line with the [CMI Code of Conduct](#) and are committed to completing and recording annual CPD

**Please Note:** Your narrative in this application must describe your effective performance and what you personally have achieved. Where possible your submission should not exceed 8 pages, and use of graphs, diagrams, tables or appendices is not allowed.

Appropriate levels of written and spoken English are expected; all documentation must be in English.

Information you provide in this form will only be accessible to the CMgr admin team, your assessor and a moderator.

Please email your completed submission to [cmgr@managers.org.uk](mailto:cmgr@managers.org.uk)

# About You

<b>Name:</b>	
<b>CMI Membership Number:</b>	
<b>Email:</b>	
<b>Telephone:</b>	
<b>Mobile:</b>	
<b>Employer:</b>	
<b>Job Title:</b>	
<b>Work Address:</b>	
<b>Years in current role:</b>	

Country of work:	
------------------	--

Guidance has been provided below in each section. Please delete the guidance and replace it with your own information.

## Submission Application

### 1. INTRODUCTION

Place your submission in context, i.e. briefly explain the background to your submission - the sector in which you work; your organisation; your role and responsibility.

#### Guidance...

Here you should set the scene:

Provide details of your job role and the organisation you work for; you may need to outline the nature of the organisation if it isn't obvious. Briefly explain the main responsibilities of your role and where you fit into the organisation.

To provide the necessary context to the measures you introduced, please include any relevant background information in order to better illustrate the areas of effective performance you plan to provide in section 2.

#### ASSESSOR COMMENTS:

*Detail your comments here...*

### 2. ACHIEVEMENTS AND CONTRIBUTION

Describe your key achievement(s) over the last 18 months (as per guidance notes below) and explain the contribution or influence they have had on the organisation's performance. You should include measures and/or outcomes to illustrate your contribution where you can.

#### Guidance...

The organisation need not be one in which you are employed; perhaps you have recently changed employment or are particularly proud of what you have achieved in a formal, though voluntary, position you hold. For example, in a charitable body, a sports or leisure club.

Achievements will be personal to you and your role and demonstrate how you have delivered consistently effective performance within the last 18 months. Possible areas may include:

- Consistent performance in meeting or exceeding targets;

- Creating something that delivered positive results for your organisation; product, service or market development;
- Changes you have introduced which have improved operations and/or how people work;
- Making significant savings or performance improvement via a new way of doing things;
- Maintaining performance in the face of difficulties, e.g. reductions in staffing levels;
- Maintaining and sustaining your business model; motivating staff to retain skills; maintaining the level of turnover (even if not growing); maintaining established links with key stakeholders;
- Mitigating losses and sustaining business viability in recessionary times;
- Increasing profit or market share;
- Turning a department or business activity around.

To illustrate your achievement you should include measures where possible; “hard” measures e.g. savings made, or “soft” measures e.g. increased customer satisfaction.

A good starting place to identify your achievements may be from the performance objectives you were set, or from a recent appraisal. Or you might ask yourself - what am I most proud of having achieved or delivered in the last 18 months.

N.B. operational changes must be within the last 18 months. You should focus on outcomes, results or measures delivered in the last 18 months.

**ASSESSOR COMMENTS:**

*Detail your comments here...*

### 3. EXPLAIN HOW YOU USED THE SKILLS OF ‘LEADING PEOPLE’ TO ACHIEVE THE OUTCOMES IN SECTION 2 ABOVE

Select three of the leading people sub-skills from the guidance notes below. Using examples, describe specifically how you used each sub-skill to lead people effectively; focus on what you personally did and why.

**Guidance...**

You have told me “what” you did and now you’re explaining “how” you achieved the results identified in section 2. There needs to be a clear link between the narrative provided in this section and the outcomes you have detailed in Section 2.

Please select three sub-skills for this Leading People section from the list below:

- Provides clear purpose and direction;
- Inspires trust respect and shared values;
- Communicates clearly and succinctly;
- Develops and supports others;
- Resolves problems and conflicts with positive outcomes;
- Adapt leadership style to take account of diverse situations;
- Promoting wellbeing and valuing staff.

Using each sub-skill as a heading, describe how you have applied that skill; it is not sufficient to simply describe why the skill is important, you need to explain the following:

- what you did;
- how you did it;
- with whom or to whom;
- why;
- what were the benefits;
- how does this demonstrate your ethical approach as a manager.

It is important to explain what you actually did. For example: Stating “I provided support to the team” is fine; but how exactly did you provide the support? What methods did you adopt? How does this demonstrate your ethical approach in accordance with the [CMI Code of Conduct](#) and how did the staff (or others) benefit?

Where others are involved it is important to emphasise your own contribution. Try and give real-life examples of how you applied the chosen sub-skill (in around 400 – 750 words for each sub-skill).

There is no need to give any academic references here.

All the skills are equal – therefore choose those that you can most easily relate to the activity. For examples of how a sub-skill may be used refer to Appendix A

**ASSESSOR COMMENTS:**

*Detail your comments here...*

#### **4. EXPLAIN HOW YOU USED THE SKILLS OF ‘MANAGING CHANGE’ TO ACHIEVE THE OUTCOMES IN SECTION 2 ABOVE**

Select three of the managing change sub-skills from the guidance notes below. Using examples, describe specifically how you used each sub-skill to manage change effectively; focus on what you personally did and why.

**Guidance...**

Mirroring the requirements in section 3, please select three sub-skills for this Managing Change section from the list below:

- Creation of an environment to enable others to be creative, innovative and value quality;
- Identify opportunities for change and development;
- Scope plan and drive change;
- Manage others through the change process;
- Consistently apply strategic thinking;
- Take account of stakeholder issues.

Using each sub-skill as a heading, describe how you have applied that skill; it is not sufficient to simply describe why the skill is important, you need to explain the following:

- what you did;
- how you did it;
- with whom or to whom;
- why;
- what are the benefits;
- how this demonstrates your ethical approach as a manager.

It is important to explain what you actually did. For example: Stating “I provided support to the team” is fine; but how exactly did you provide the support? What methods did you adopt? How does this demonstrate your ethical approach in accordance with the [CMI Code of Conduct](#) and how did the staff (or others) benefit?

Where others are involved it is important to emphasise your own contribution. Try and give real-life examples of how you applied the chosen sub-skill (in around 400 – 750 words for each sub-skill).

There is no need to give any academic references here.

All the skills are equal – therefore choose those that you can most easily relate to the activity. For examples of how a sub-skill may be used refer to Appendix A

**ASSESSOR COMMENTS:**

*Detail your comments here...*

## 5. IDENTIFY YOUR PRINCIPAL LEARNING LESSONS

Reflecting on the experiences you have described in this submission, you now need to identify...

- What you have learned about your skills of leading people and managing change
- With hindsight what you would have done differently and why

Remember it is more about your behaviours rather than any process you used

**Guidance...**

Reflection is at the heart of developing the skill to learn continually from experience; reflection will be personal to you – it is what you have learned that is of interest here.

In this section you firstly need to critically reflect on your experiences, activities and use of the skills to draw out any learning that might help you in the future.

You may for example have discovered that you were better at handling conflict than you thought or were surprised that you aren't as good at influencing and negotiating as you thought. How did you overcome any challenges? Were they easy or more difficult than expected?

So this in essence is where you reflect on your strengths and weaknesses; and where you may need to learn new or build on existing skills.

Then secondly, reflect constructively on how you might have done things differently and the lesson(s) learnt so that if you were to undertake a similar exercise in the future you could do things better

**ASSESSOR COMMENTS:**

*Detail your comments here...*

## 6. IDENTIFY YOUR FUTURE LEARNING PLANS

Drawing on your reflection in question 5 and any planned changes within your role / responsibilities you need to identify:

- The skills and knowledge you need to develop over the next 12 months
- The activities you plan to undertake to achieve these goals

What are your goals and what skills or knowledge do you need to develop to help you achieve those goals?

It is useful to identify what your learning aims and purposes are, the activities to achieve them and what time-frames you are considering.

This is an opportunity to demonstrate your commitment to your continuing professional development.

Remember that development activities are not restricted to formal training courses, and may occur through day-to-day activities, including: coaching and mentoring; delegation; secondments; experiential learning, or distance

learning; lectures; talks; conventions; conferences; research and reading e.g. via the internet, books, journals etc.

Use the table below to capture your CPD plans...

Learning / Development Goal	Skills / knowledge development needed	Planned activity to meet those needs	Timeframe for completion

**ASSESSOR COMMENTS:**

*Detail your comments here...*

## 7. WHO CAN CORROBORATE YOUR CLAIM?

Provide details of at least one key individual to support your claim for Chartered Manager in the table below.

Your corroborator should be a senior manager or your line manager. If it is not possible to provide this type of corroborator then you should identify a peer or a client. In all instances this should be someone who can confirm and expand on the value that you have added to your organisation / the client and give their perspective of how you apply your skills to lead people and manage change.

It is important that you think carefully about who you select as corroborator, ensuring that they will have sufficient knowledge about you and the work you have undertaken.

You need to keep corroborators informed about their role in your submission; that your assessor will contact them asking for their perspective and views on how you have made a difference and your usage of the sub skills. The assessor will be looking for a swift (ideally within 5 working days) and relatively detailed response (approximately 500 – 750 words) in support of your submission.

Assessment cannot be completed until corroboration has been received.

You may be asked to provide the name and contact details of additional corroborators if your initial corroborators do not provide sufficient information to confirm your achievement and skills application. As an alternative, you can forward witness testimonies or a copy of a recent performance review to your assessor – these can be accepted in place of corroboration provided they clearly support your claims.

NAME	EMAIL	PHONE	WORK RELATIONSHIP
<i>Should be your line manager or a senior manager where possible</i>			





# To be completed by the Assessor

Assessor Name:

Date of Interview:

Indicate the principal focus of the claim - choose 1 only and delete all others:

- Consistent performance in meeting or exceeding targets
- Maintaining performance in the face of difficulties
- Mitigating losses and sustaining business viability in recessionary times
- Creating something that delivered positive results; product; service or market development
- Improved operations and/or how people work
- Making significant savings or performance improvement via a new way of doing things
- Turning a department or business activity around
- Increasing profit or market share

## Recommendation

**1. I recommend the candidate is awarded Chartered Manager**

Feedback to candidate:

**2. Further revision required, please complete / indicate below**

1st referral

2nd referral

failed application

Feedback to candidate:

# Appendix A

The examples below are indicative of the type of scenarios/issues that could link to the sub-skills for Leading People or Managing Change – they are not exhaustive or prescriptive; candidates may use other examples.

## **LEADING PEOPLE - When describing your actions against sub skills, remember to reflect on the Code of Conduct and Practice that needs to be included in your submission evidence**

### **Provides Clear Purpose and Direction**

Using influencing and persuasion skills to engage people within your organisation and other key stakeholders, to define your organisation's direction and commit their energies and expertise to achieving results.

For example, using a series of presentations, workshops and one-one sessions (or other similar methodologies) to explain expectations/objectives, so there is no misunderstanding others had clear purpose and direction.

Using strategic diagnostic tools such as SWOT or PESTLE to provide a common purpose or direction. How did you know these were the right tools/approach for your audience? Was there any feedback from colleagues concerning your ability to provide clear purpose and direction?

### **Inspires Trust Respect and Shared Values**

Recognise and respect the roles, responsibilities, interests and concerns of colleagues or others.

Achieving positive results required by engaging with staff in a meaningful way, allowing you to communicate and articulate your personal values and those of the business.

Demonstrating respect by taking account of cultural differences. Leading by example and taking the time to reward or recognise people as appropriate.

What is it that you do to earn the respect and trust of others?

### **Communicates Clearly and Succinctly**

Identify how people prefer to receive information and knowledge and what media, languages, styles, timing and pace are most appropriate.

Communicate in ways that help people to understand the information and knowledge you are communicating and their relevance. Use a variety of techniques to gain and maintain people's attention and interest and to help them retain and use information and knowledge.

Recognise the importance of accurate, meaningful, relevant and up-to-date communication. Check understanding and initiating feedback mechanisms.

### **Develops and Supports Others**

Provide individuals with appropriate opportunities to apply their developing competences in the workplace.

Support individuals/team members in undertaking learning activities, making required resources available and making efforts to remove any obstacles to their learning.

Discuss with individuals their progress and their readiness to take on new roles and responsibilities, and agree the support and supervision they will require. Provide individuals and teams with the support and mentoring they require and ensure they receive specific feedback to enable them to improve their performance.

Monitor and review the effectiveness of working relationships with colleagues (or other relevant stakeholders) in order to identify areas for improvement. Mentor or coach others within the organisation.

### **Resolves Problems and Conflicts with Positive Outcomes**

Identify potential conflicts between team members and other stakeholders and take preventative action to avoid these. Encourage team members to resolve their own problems and conflicts amongst themselves.

Take action to deal with conflicts and to resolve problems when the people concerned are not able to resolve the conflicts themselves.

Acknowledge and show respect for peoples' emotions regarding the conflict and seek to manage any negative emotions. Investigate impartially the causes of the conflict, giving all parties opportunities to present the facts and their perceptions about the conflict.

Identify and agree with staff involved how to resolve the conflict, without apportioning blame. Seek help from colleagues, specialists or relevant others where necessary.

### **Adapt Leadership Style to Take Account of Diverse Situations**

Use a range of leadership styles appropriate to different people and situations. Understand the differences between managing and leading. Identify ways of ensuring organisational plans support the organisation's purpose, values and vision.

Compare or contrast the effect that different leadership styles (e.g. coaching and autocratic) can have on achieving outcomes in your organisation. How can style influence, persuade and empower people?

Examples can include working with stakeholders/others with vested interest in the organisation; e.g. public sector, governmental links.

### **Promoting Wellbeing and Valuing Staff**

Engage staff and other stakeholders in promoting the wellbeing of people. Development of a wellbeing culture and procedures for welfare and occupational health, job satisfaction and stress management.

Demonstrating a commitment to an inclusive workplace where diversity and individual differences of staff are valued and respected. Depending on the industry/sector, there would possibly be specific regulatory requirements for enhancement of staff wellbeing.

Measurement indicators could include attendance and job satisfaction surveys.

## **MANAGING CHANGE - When describing your actions against sub skills, remember to reflect on the Code of Conduct and Practice that needs to be included in your submission evidence**

### **Creation of an Environment to enable others to be Creative, Innovative and Value Quality**

Engage appropriate people within your organisation in identifying and evaluating opportunities for innovation and quality improvement. Create and maintain a culture which encourages and recognises creativity and innovation in the organisation.

Emphasis should be on what you (as manager/leader) do to enable others in the organisation to be creative and innovative. For example, organising brainstorming sessions that empower staff to generate new ideas, some of which are then implemented.

Using incentives or rewards to encourage the generation of new ideas.

### **Identify Opportunities for Change and Development**

The emphasis for this sub-skill should be on the process by which opportunities (ideas) for change and development were identified or recognised. You should highlight your own personal role in identifying these opportunities and link them to your achievements in Section 2. Having identified the opportunity, what did you actually do?

### **Scope, Plan and Drive Change**

Define the skills and competencies necessary to perform change effectively in a given area with all key areas addressed. Manage appropriate people within your organisation and other key stakeholders in planning change.

Establish with key stakeholders the processes, systems, structures, roles or cultures that need to be changed. Identify and evaluate obstacles to change.

You should be able to explain how you developed a detailed plan to achieve the required change effectively and efficiently.

## **Manage Others through the Change Process**

Understand the importance of communication through the change process. Which groups or individuals does the change affect and in what ways? How will the change be implemented?

Provide support mechanisms to help people impacted by the change cope, taking ownership of the change process. For example, establish the benefits of engaging with the change process to those impacted by it and the organisation.

Was there any resistance to change, if so, how was this managed/mitigated?

### **Consistently Apply Strategic Thinking**

Demonstrate an ability to take a broader perspective of your organisation and wider business environment.

Demonstrate the ability to develop a clearly defined and focused business vision. Taking a short, medium and long-term focus where appropriate, and have the ability to apply relevant strategic tools (for example, GAP or PESTLE analysis, business planning tools etc.).

Understand how to translate wider corporate strategy into tangible benefits for others and the organisation as a whole. Candidates should distinguish between applying strategic, as opposed to operational, thinking.

### **Take Account of Stakeholder Issues**

Display a clear understanding of who the key stakeholders (internal and external) are, and what mechanisms are used to engage with them. Were there any 'actionable outcomes' as a result of engaging with relevant stakeholders?

The role and requirement of salient (or more powerful) stakeholders and the importance of getting them to buy into change. Difficulties in managing stakeholders who may have differing agendas.

Managing stakeholders in an organisation that operates across different countries and cultures. Ensuring communication channels reflect the importance/complexity of stakeholder involvement.