

Business and financial project managers

General competency framework · Professional level · 5 competencies · approx. 75 minutes

How to use this guide

- Focus on these 5 competencies — the behaviours that matter most for this role — not a chronological career history.
- Ask every candidate the same core questions, then probe. Allow around 15 minutes per competency.
- Ask for real examples and use STAR — the Situation, the Task, the Action they took, and the Result.
- Stay neutral, capture what they say, and judge later. Gather evidence on one competency at a time.
- Rate each competency 1–5 against the positive and negative indicators, and note the evidence.

5 Outstanding 4 Good 3 Acceptable 2 Marginal 1 Poor

1. Organisational Skills

Establishes clear priorities and builds plans to ensure delivery on time. Works in a systematic manner and manages resources efficiently. Quickly adapts plans as circumstances require. Sees things through to completion.

Why this matters for Business and financial project managers: APM Competence Framework Section 2 (Delivery) names Schedule management, Resource management and Quality management as core operational competences. Project management is organisational skill made explicit: priorities, plans, systematic delivery, adaptation to changing circumstances, completion. The whole role is this competency in action.

Tell me about a time when you were responsible for implementing a plan.

- What stages did you work through – how did you plan for success?
- On what basis did you determine priorities?
- How did you allocate resources?
- What were some of the risks? How did you identify & manage these?
- What happened when things did not go to plan?
- What methods did you use to monitor progress?
- What was your key learns from this process?

We are often faced with conflicting demands on our time. Can you give a specific example of when you have had to prioritise work activity?

- How did you go about making decisions about the priorities?
- How do you know that you were effective in your prioritisation?
- How could you have increased your effectiveness?
- How did you manage distractions and stay focused on the right things?
- Tell me about a time when you have had to shift your priorities in response to emerging business needs?

Describe a time when you have organised scarce resources to get the best result possible for the business

- How did you go about doing this?
- How did you monitor progress?
- What was the outcome?
- What would you do differently next time?

NEGATIVE INDICATORS	1 · 2 · 3 · 4 · 5	POSITIVE INDICATORS
Fails to appreciate the importance of planning and review to successful task delivery		Creates comprehensive plans to increase the chances of successful delivery
Is less structured and methodical in approach		Adopts a structured and systematic approach to tasks
No evidence of contingency planning for changing circumstances/unforeseen issues. Fails to proactively assess and manage risk to delivery		Includes detailed contingency plans for delivery. Anticipates and mitigates risk to plans
Shows limited ability/willingness to flax and deviate from the plan in the light of new information/ circumstances		Quick to rethink/reformulate plans in the light of new information/unforeseen events
Fails to establish clear priorities therefore does not manage self/use own time as effectively as they could		Manages self and own time effectively by being clear on priorities
Fails to manage conflicting demands on time – lets real priorities slip or becomes overloaded		Able to (re)prioritise and juggle priorities on the basis of new information/changing circumstances
Is wasteful with resources or does not deliberately plan resources based on anticipated returns		Manages resources effectively – considering where to best place resources to generate maximum value
No clear structure/process evident for managing progress /measuring performance to time, budget and quality		Puts clear structures and processes in place for monitoring/managing progress to time, budget & quality
Loses cool when things do not progress as expected – increases effort without tackling the source of the issue or checking the expected return on the increase in effort		Responds calmly when things go off track. Creates time to take stock and review when feeling under pressure to respond and deliver
May move onto the something new prior to completing the task in hand		Sees things through to completion

Summary of evidence: _____ Rating (1–5): _____

2. Decision Making

Understands critical success factors and assesses a range of possible options before making a decision. Steps back and seeks alternative perspectives when faced with unfamiliar scenarios. Willing to make decisions without access to all the information. Considers the implications of their decisions beyond the immediate issue.

Why this matters for Business and financial project managers: APM CF Section 2 covers Risk management, Reviews and Change control. PMs make constant judgement calls on scope, risk, resource, and escalation, with incomplete information and tight timescales. Decision Making captures structured assessment of options and willingness to act under uncertainty — central to the role.

Describe a situation where you had to assess a number of possible options prior to making a decision.

- What were the options? Which did you choose?
- What criteria did you use to make the decision?
- What were the pros and cons of the other options?
- What was the outcome?
- What was the business impact of the decision?

Tell me about a time when you felt it was necessary to seek alternative perspectives/refer a decision upwards before taking action.

- What was the context?
- Why did you choose to refer/seek other perspectives?
- What challenges did this add to the decision making process?
- How did this help you/impact the quality of the final decision?
- To what extent do you still seek support/refer in this area?

Tell me about a time where you feel you were too hasty with your decision making/failed to consider the knock on implications of your decision?

- What makes you say that?
- Why did you feel you needed to be hasty/fail to consider consequences?
- What would have been the implications if you had deferred/understood the impact?
- What lessons have you learned from this? How has this informed your approach?

NEGATIVE INDICATORS	1 · 2 · 3 · 4 · 5	POSITIVE INDICATORS
Makes decisions without a clear understanding of critical success factors and without clear criteria against which to analyse particular courses of action		Ensures they have clarity on criteria and critical success factors prior to engaging in decision making
Is rather blinkered in decision making – fails to consider the full range of alternatives or to accept that there may be alternative options		Considers a range of alternatives/options when making decisions and objectively assesses the pros and cons of these
Makes decisions without a full understanding of the wider context and the knock on implications		Appreciates the business impact of decisions – understands the wider ramifications and implications
Goes it alone, failing to get support or alternative perspectives where this is required (e.g. in unfamiliar situations/where information is incomplete)		Understands where additional perspectives could support the decision making process and is prepared to seek support and guidance prior to making decision
Fails to apply and adapt learnings from previous experience or trust tacit knowledge when dealing with novel situations		Applies and adapts previous experience to novel situations
Fails to consider a range of angles or the implications of different courses of action. Focuses exclusively on hard facts/quantifiable information at the expense of the emotional/ people aspects of the situation		Considers issues from a range of angles (e.g. cost, risk, impact, benefit, short and long term opportunities, impact on people)
Rushes into decisions – is hasty and often makes decision on the basis of a superficial analysis		Willing to make decisions and take calculated risks on the basis of absent/incomplete information
Shies away from making difficult/contentious decisions. Abdicates responsibility or defers the judgement to others		Is prepared to make and stand by difficult decisions

Summary of evidence: _____ **Rating (1–5):** _____

3. Influencing and Persuading

Presents simple, impactful messages in a compelling manner. Changes their emphasis and approach to address resistance, focusing on the value their ideas will bring different stakeholders. Confidently negotiates effective outcomes.

Why this matters for Business and financial project managers: APM CF Section 1 (People) names Communication, Conflict management and Leadership as core competences, and Section 2 places Stakeholder & communications management as central to delivery. Without direct authority, PMs depend on influence — winning over sponsors, negotiating with stakeholders, handling resistance, keeping teams aligned. This is arguably the most underrated PM skill.

Describe a situation where you had to explain something to somebody who did not share your level of understanding on the subject.

- How did you make the message meaningful/accessible?
- What were the main challenges with this communication?
- How did you deal with these? What approach did you take?
- How did you gauge the effectiveness of your communication?

There are times where no one is prepared to listen or it is hard to keep the attention of others. Give me an example of a time when this has happened to you.

- What were the main objections/issues/barriers to others listening?
- How did you overcome these?
- What insight did you get into your audience? How did you get this?
- How did you use this insight to inform your style of communication?
- How did you present your message? What worked well? Less well?
- What was the outcome of the communication?

Describe a situation where you persuaded someone to do something (e.g. accept your point of view/get on board with an idea/commit to buying a product or service).

- How did your opinion contrast with their initial position?
- What was the main point of contention? How did you win them round?
- What was the outcome? What agreement was reached?
- What were the key things you did that made you successful?
- Has there been an occasion when you have been unable to persuade?

NEGATIVE INDICATORS	1 · 2 · 3 · 4 · 5	POSITIVE INDICATORS
Fails to convey information in a simple and accessible manner. Uses unnecessary jargon or fails to appreciate the baseline level of understanding of the audience		Aware of the need to keep messages simple and impactful – avoids using jargon and tailors message to the base level understanding of the audience
Presents information without consideration of the needs/ style/preferences of the audience. As such message may lack impact/be less compelling		Considers the style and needs of the audience when communicating. Adjusts style/tone/content to ensure the message is compelling and resonates
Highly logical/rational/factual in approach – no passion or enthusiasm displayed in tone/pace/body language/words when communicating with others		Displays passion and enthusiasm when interacting with others
Fails to emphasise the value that their ideas will bring to each individual stakeholder. Does not sell on an individual/emotive level		Considers the benefits to individual stakeholders and sells on the basis of these. Presents the information of value to them rather than losing this in all of the facts/detail
Loses credibility by presenting imbalanced arguments (e.g. focusing on the pros and disregarding the cons)		Presents a balanced view of pros and cons rather than an overly rosy picture

Fails to pick up on cues from audience (e.g. resistance/ apathy/opposition) or picks up on these but chooses to ignore them and presses on with message regardless		Tuned into the audience and able to pick up cues of disinterest/apathy/opposition/resistance. Confidently surfaces and deals with these
Becomes overly apologetic or deferential when faced with objections/resistance. Lacks conviction.		Handles objections convincingly – displays confidence and conviction when faced with opposition
No evidence on changing emphasis/approach/ tone based on insights gained/responses from the audience. Is firmly on transmit rather than receive when communicating		Prepared to change emphasis/ tone of communication in the moment in response to insights gained about the audience
No evidence of proactively seeking feedback on effectiveness of communication		Seeks feedback to gauge the effectiveness of communication and applies learning to new situations
No evidence of checking understanding of audience to ensure that messages are landing effectively		Seeks to clarify understanding to ensure that communication has landed effectively
Is less confident in situations requiring negotiation		Confidently negotiates successful outcomes
Enters negotiations without clarity on where concessions can be made and with limited understanding on items of high perceived value to the other party.		Prepares well for negotiation. Understands where concessions can be made and appreciates and uses items of high perceived value.

Summary of evidence: _____ Rating (1–5): _____

4. Analytical Skills

Breaks a problem down into its core elements. Draws on different data sources to inform their thinking, identifying the most pertinent issues within this. Incorporates the emotive elements of a situation into their thinking, before making sound inferences based on the available information.

Why this matters for Business and financial project managers: APM CF Section 2 covers Solutions development, Risk identification and Reviews. Good PMs break complex deliverables into component parts, read the data (RAG, burndown, dependencies), and identify the real issues rather than the presenting symptoms. Analytical Skills captures this sustained reasoning across the project life cycle.

Describe a time when you were faced with a complex problem to solve/the last time you had to analyse a lot of information or data.

- What made the problem complex?
- How did you go about analysing the situation/data?
- What information did you need? Where did the information come from?
- What kind of information is easiest for you to work with/most difficult?
- What were the key issues/angles that needed consideration?
- What information was most relevant?
- How did you ascertain what was relevant?
- What did you learn from the analysis?

Tell me about a time when your analysis into a situation revealed something unexpected or surprising.

- Why was this unexpected/surprising?
- What did you do to uncover it?
- What did you do with this revelation?
- How did it change your response to the situation?

- What lessons did you learn from the process?

Can you tell me about a time where you feel you took the wrong approach to problem solving?

- What led you to take this approach?
- With hindsight, what would have been the better approach?
- What was the outcome?
- What key lessons have you learned about problem solving?

NEGATIVE INDICATORS	1 · 2 · 3 · 4 · 5	POSITIVE INDICATORS
Gets overwhelmed by complexity – sees the problem as a whole rather than being able to break it down into component parts		Identifies the core elements/components of a problem. Breaks down complex issues/problems into smaller parts
Takes a rather unstructured approach to analysis – lacks logical and sequential steps		Takes a logical and systematic approach to analysis
Manages the symptoms of the issue rather than seeking to understand the root cause (superficial analysis)		Insightful – able to get to the root cause of issues and tackle these rather than deal with the symptoms
Gets lost in the detail and is unable to identify the pertinent information		Identifies relevant/pertinent information rather than getting lost in the detail
Is narrow in approach – fails to consider a range of angles or draw on different sources of data		Draws on different sources of data to inform their thinking – views issues from a broad range of angles
Fails to integrate data from different sources and spot themes, trends and patterns. Views different pieces of data in isolation		Integrates data from different sources, spotting themes, trends and patterns
Does not move beyond analysis to making interpretations and drawing conclusions from the data		Looks beyond analysing to interpreting the information they are presented with – e.g. identifying implications and causal links
Misinterprets or draws inappropriate conclusions from data		Makes sound inferences based on the information available
Fails to appreciate the people/emotive aspects of a situation. Focuses exclusively on the hard facts		Incorporates how people think feel and behave into their considerations – considers not just the facts but the people/emotive aspects of a given situation

Summary of evidence: _____ Rating (1–5): _____

5. Collaborative Working

Looks to understand others' perspectives and objectives. Respects different styles/approaches, whilst adapting their own style to enable them to work effectively with others.

Why this matters for Business and financial project managers: Section 1 (People) sits first in the APM Competence Framework, with Teamwork and Diversity & inclusion as named competences. Modern project delivery — especially under APM's emphasis on agile and hybrid methodologies — is squarely about working across multi-disciplinary teams (engineering, product, finance, vendor, sponsor). Collaborative Working captures the ability to understand others' perspectives, respect different styles, and adapt one's approach to deliver collectively. Replaces Dependability, which APM CF does not single out as a defining competence and which is captured within Organisational Skills ("sees things through to completion").

Tell me about a time when you proactively sought the views of/engaged others to resolve a business issue.

- How did you ensure that the right people were engaged?

- How did you demonstrate that you had understood their views?
- How did their input inform and shape the final decision?
- What feedback did you receive?
- With hindsight, what might you do differently next time?

Describe a situation where your personal views/objectives were at odds with the team/key people around you?

- How did you react?
- How did you demonstrate you understood/respected their perspective whilst being clear about your own?
- What was the outcome?
- What did you learn about how best to engage with others?

Describe a situation where you have had to work hard to really understand the perspective of another person?

- What was the reason for the lack of understanding?
- What made it difficult to gain this understanding/get under the skin?
- How did you manage this?
- How have applied the learning from this situation to enhance your interactions with others?

NEGATIVE INDICATORS	1 · 2 · 3 · 4 · 5	POSITIVE INDICATORS
Fails to engage and seek the views of others. Is more directive in approach and therefore may gain compliance rather than commitment to action/ideas		Proactively seeks the views and opinions of others when dealing with business issues – adopts a more collaborative/democratic approach to problem solving
Seeks to be seen to engage rather than actually demonstrating that they have heard the views and ideas of others (e.g. by adjusting their path or shifting their perspective in the light of the information gleaned)		Listens carefully to the thoughts and ideas of others and demonstrates that they have listened to and heard their views (e.g. by shifting own perspective in the light of the information given)
Adopts a “my way or the highway approach” – has strong views and may be less respectful of counter views or arguments		Shares own ideas/opinions willingly whilst recognising and respecting the views and opinions of others
Fails to manage conflict/divergent views or styles and approaches		Effectively manages conflict and potentially divergent views to get positive outcomes for all parties. Appreciates the need to work with others with different styles and approaches to their own
Seeks to be understood rather than truly understand the needs/objectives and perspectives of others. Transmits own views rather than questions to better understand		Takes steps to really understand the goals and objectives of others
Adopts a one style fits all approach. No evidence of adjusting/adapting style based on the needs of the situation and audience		Adapts style effectively based on understanding of the needs and objectives of others
No evidence of reflecting on the impact of their own style or of considering how they might be contributing to the breakdown of working relationships		Aware of the impact of own style on others and the need to check out assumptions they make about others and their style of working/needs/preferences

Summary of evidence: _____ **Rating (1–5):** _____