

Post15 – Assessment of Project Managers

This is a 5-minute read that identifies the deficiencies of corporate-defined performance measures and encourages the project manager to practice periodic self-assessment with the aid of a competency framework.

Here's a thorny topic, one with several dimensions. For this brief discussion, I sort out why assessments are needed and why corporate measures of performance are inadequate, and propose an approach that assesses basic personal capability.

In my experience, the assessment of a project manager (PM) is, or should be, a factor in several spheres of management:

- Salary, retention, and promotion
- Coaching and training
- Periodic performance reviews
- Project failure post mortem
- Fitness for project assignments.

Obviously, these management determinations improve with a reliable assessment of an individual's capability. This ultimately improves the performance of the firm. They are also of intense importance to the employee who should be aligned with the firm on each of these, but often isn't. An example is the annual performance review. Assessing an employee's performance is a tough part of a manager's role. I have never found a manager or an employee who actually looks forward to the occasion. Perhaps that's why it's often poorly done. There are also differences in how performance is assessed from one firm to the next, and often inconsistencies within the firm.

A main point of contention is how performance is rated. The usual approach is to list various elements of the job and then subjectively determine whether during the review period the employee met the requirements or not. Firms also have a strong urge to create a numeric scale and compute a score which can be fed into a system. Structured or unstructured, using MBO, rated or qualitative, use of the bell curve model or not, 360-degree input, formal or informal – I think I have seen all variants, and enjoyed none of them! In fact, most performance 'systems' are generally disliked and for many reasons may not always be credible. Management are entitled to measure performance however they define it, but a more basic, deeper, personal assessment is needed for purposes other than annual bonus qualification.

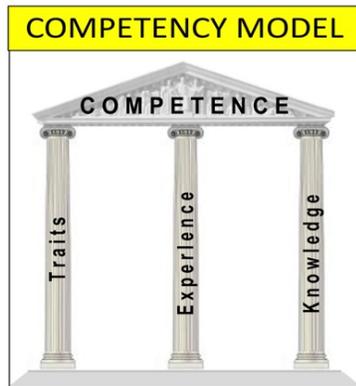
So, my intent here is to change gears and think of assessing PMs against a universal set of competencies. Competencies should form the foundation for salary, training, performance, and assignment determinations. I prefer an approach that rates each competency as a strength, a weakness, or as neutral. The issue can then most usefully turn to what should be done about it – actions for both the employee and the firm. Furthermore, universality allows the PM to build ongoing self-assessment into their personal career management and improvement program, and at the same time deal positively with whatever management system they encounter along the way.

What is Competence?

At the heart of the PM's (or anyone's) job is personal competence. This is defined as the ability to do something successfully or efficiently. It sounds like common-sense and nothing complicated to argue about, until we ask what makes up PM competence. I believe there are three distinct and universal components which support PM competence, each of which can be assessed and developed. They are: personal traits, knowledge, and experience.

Traits get a lot of argument: what traits does a PM exhibit, are they positive or negative, are they inherent to the person or are they teachable?

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Knowledge is a little easier to deal with since the advent of the PMBOK® (PM Body of Knowledge) thirty or so years ago; the primary issue is determining its importance.

Finally, experience is not just the record of achieving results or meeting objectives, but also a measured scrutiny of how adverse or unfavourable circumstances were handled. Thus, an experienced individual is an integration of their project histories. (Performance reviews, certainly a valid management tool, are near-sighted and focus only on annual achievements. *How* the results were achieved is of lesser importance, and the assessment of any personal gains in experience usually absent.)

Personal Traits

A trait is a person's distinguishing quality or characteristic. These include willingness and enthusiasm, cognitive ability, work habits, charisma or influence, and style of leadership. More mundane qualities also show up when assessing oral and written communications, and other attributes that might be considered managerial.

For a PM, key traits might be evident, but it does no harm to write them out as you understand them. For example, valid managerial traits might be: aptitude for coaching and organizing, assertiveness, use of positional power, negotiation, teamwork, cooperation, and flexibility. Leadership traits might be: team alignment and direction, ability to motivate and inspire, persistence, judgment, delegation, decisiveness, drive for results, energy, and confidence. (In [Commercial Project Management](#), I include several checklists of leadership and operational techniques and skills.)

Knowledge

Regardless of the interminable debate about whether possession of a PMP makes a better PM, I will say this: all things being equal, I would certainly prefer to hire a PM who demonstrates knowledge of the many techniques specific to PM and almost as important, the circumstances under which they should be applied. PMBOK® documents over 45 processes, many encompassing a handful of techniques, so there is plenty to learn!

Also important are technology and toolkit knowledge, business process knowledge, behavioural theory, and development methodologies. According to [Commercial Project Management](#), the essential practices that require a theoretical foundation are lifecycle mapping, accountabilities definition, estimating, and risk, quality, and resource management.

Experience

The universal metric for experience is 'number of years' and most of us realize it is probably flawed. Its value improves with qualification, otherwise the claim of 'ten years experience' might just turn out to be one year repeated ten times!

The best way to qualify project experience is to start with aggregating results achieved against plan: costs, schedule, scope and client satisfaction. Complexity of issues and skill requirements vary significantly with size and difficulty, so project metrics such as team size, risk rank, overall budget and duration should also be noted. For less advanced PMs, a good way to calibrate experience is to break out PM into the generally accepted areas of initiation, planning, controlling and monitoring, and closing. Again, successful assessment relies on establishing some detail for each area. For example, during initiation, how well did the PM perform in getting objectives set and agreed, getting activities planned

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and started, building the team, developing the project organization, and establishing the project mandate?

Takeway

Assessment based on PM performance in the corporate setting is short-term, impersonal, and is not standardised. I recall in one firm I asked for the appraisal form and was handed a blank sheet of paper! At another firm, a checklist of teamwork requirements included the supply of doughnuts at project meetings! Firms and their PMs could benefit by adopting a *competency model* for decisions that require deeper PM assessments. This includes salary, promotion, and project assignments.

A very useful discipline is for PMs to periodically assess their competence for themselves. A reliable framework is to review along three axes – traits, knowledge, and experience. An honest result provides the PM with insights to deal with whatever corporate bureaucracy is in place. The PM knows where their strengths lie and where improvements are needed, has a rational opinion on required training, and could substantiate requests for promotion or more senior project assignments.

It boils down to this: know yourself! For each element on your personal checklist determine whether it is a strength or weakness. In project or business scenarios, play to your strengths and cover weaknesses by astute hiring and delegation. And perhaps keeping your mouth shut! If a weakness can be eliminated, look at behaviour modification and take advantage of available coaching, mentoring and training. To manage your own career progression, you need to start by managing the competencies that drive your performance. Or as Jack Welch said “Control your own destiny or someone else will.”

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Robin’s recent publication is [‘Commercial Delivery Methodology’](#) (CDM) available as a Google eBook download. This is a phase-by-phase specification of how to sell and deliver a project contract and make a profit. A treasure-trove of techniques, models, and templates, it’s the perfect companion to [‘Commercial Project Management’](#) (CPM).

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