Project Management Assessment

Apply an In-Depth Approach to Project Management to Achieve Systematic Success
Your Journey Starts Here.

Understand Your PM Strengths & Weaknesses

Evaluate Performance and Required Next Steps by PM Area

Build a PM Improvement Roadmap

The following report is a sample of what you will receive after completing the Project Management Assessment. Each report is customized to the individual organization highlighting the PMO’s most pressing project management needs.

Complete the diagnostic program to get the data you need to start your Project management journey.
## Project Management Assessment Copy: Inside the Report

<table>
<thead>
<tr>
<th></th>
<th><strong>Understand Your PM Strengths &amp; Weaknesses</strong></th>
<th><strong>Evaluate Performance and Required Next Steps by PM Area</strong></th>
<th><strong>Build a PM Improvement Roadmap</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Once a year, take a step back from day-to-day PM operations and look at the big picture.</td>
<td>Communicate current strengths, and use year over year comparisons to measure long term progress.</td>
<td>Cut through the noise: uncover the processes that really matter in building your world-class PM function.</td>
</tr>
<tr>
<td></td>
<td>Measure your PM practices against industry standard best practices</td>
<td>Identify areas for improvement, and justify allocation of resources toward these goals.</td>
<td>Align your team behind achieving your vision, communicating the rationale behind your decisions.</td>
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<tr>
<td></td>
<td>Build your framework for managing &amp; improving PM practices over the long term.</td>
<td>Measure success in terms of meeting industry standard best practices.</td>
<td>Prioritize quick wins to show your stakeholders that rapid improvement is a priority.</td>
</tr>
</tbody>
</table>
Project Portfolio Management

Project Management Assessment

PREPARED FOR:
Barry Cousins, Senior Director, PMO Practice
Info-Tech Research Group

NOVEMBER 19TH, 2015

Fill out by yourself or with your team.

Data is comprised of feedback from 4 respondents, including: Barry Cousins, Matt Burton, Trevor Bieber, Travis Duncan
INSIGHT OVERVIEW

Project Planning

61%

Planning activities vary between Project Management methodologies, but they have the same overall needs.

Key Insight: Inefficiency and poor project results can usually be tracked back to deficiencies in planning. Improve pre-project planning and ensure that a minimal level of clarity and currency is maintained throughout.

Project Resourcing

56%

The quality and quantity of resourcing plays a key role in the project success.

Key Insight: Maintaining a highly effective resourcing strategy is difficult in an era of high turnover and multiple projects. Keep visibility on these issues to ensure that time and talent are sufficient for success.

Project Execution

67%

A high quality project portfolio depends on repeatable processes.

Key Insight: Continue to look for ways to right-size the amount of process rigor in your projects.

PM PERCEIVED SUCCESS

These scores express your perceptions of overall project management success. Your answers to these questions inform the recommendations throughout this report.

"To what extent do you agree with the following statements?"

- Our projects are delivered on time, within budget, and within the intended scope.
  - Project Delivery: 71%

- Our projects produce high quality results.
  - Quality: 88%

- Our project management processes are highly efficient, allowing us to maximize throughput.
  - Throughput: 63%

- Our project customers are satisfied by the process and results.
  - Customer Sat.: 92%

- The people on our project teams are engaged and satisfied with the process and results.
  - Staff Sat.: 67%

Assess PM performance across 5 metrics. Determine which metrics you’d like to focus on improving and follow the report to learn how.

REPORT OVERVIEW

01 Dashboard
02 Project Planning
03 Project Resourcing
04 Project Execution
05 Reporting and Time Tracking

TOOLS

The sophistication of project and portfolio management tools needs to line up with the intensity of the data being managed.

Tools in use:
- Some tasks not tracked
- Manually

Insight: A successful project management practice needs a balance of successful project delivery, project throughput, satisfied staff, satisfied customers, and quality.

Overall Recommendations: Since your task planning is reasonably high level, focus on adopting the simplest task management tool or paradigm possible. It may not even be necessary to expect that every project team uses the same tool.

Project Portfolio Management

58%

Overall Score

Evaluate PM performance across 5 areas. Determine which areas require improvement and use this report to help you get there.

Time Tracking

Organizations tracking staff time need to ensure it’s both accurate and valuable.

Key Insight: There are obvious cases where time needs to be tracked for the purpose of re-billing. Beyond that, it’s becoming less common to have detailed time tracking for knowledge workers. At a minimum, it’s worth distinguishing the actual time spent on projects vs. non-projects to ensure that the high level allocations are realistic for projects, support, operations, ad-hoc, administrative, etc. Organizations need to realistically approve the amount of project work that will be realized (i.e. “Realized Project Capacity”).

Reporting

Project reporting drives the ability to manage a portfolio over the long term.

Key Insight: Increase the focus on project portfolio reporting to drive more precise project management.
Projects (or sprints, in the case of Agile) are planned sufficiently to get reasonable and realistic expectations of budget, resources, and timelines. Sponsors and stakeholders need to know what they're committing to. For Agile, it's one sprint at a time. Traditionally, planning is harder and more costly.

Recommended Action: Projects need plans for what is being accomplished, who is doing it, when they are doing it, and how much it will cost. Implement a planning process that ensures decision makers have a stronger sense of what they are funding.

Project requirements are clearly identified up-front, and are maintained on an ongoing basis over the course of the project. Requirements can change, but the need for clarity never gets old.

Recommended Action: Continually ensure requirements clarity at both the project and portfolio level.

There is a reasonable Project Charter (or other control document) that is maintained throughout the project. The Charter is essential to getting stakeholder buy-in and avoiding mission creep.

Recommended Action: The Project Charter encourages a minimum level of rigor for projects of all sizes and risk levels. Improve the consistency of your Charter to ensure that projects can be understood and compared by others.

"Project stakeholders are identified and an optimal communications plan is in place to address each individual or group." Proactive and deliberate management of stakeholders is critical to smooth change management.

Recommended Action: Determine roles up front, along with the frequency and style of project-related communications for each role.

Projects are re-planned as needed to maintain the validity of the plan throughout the project. Out of date plans cause irreparable damage to the organization's credibility.

Recommended Action: Ensure that projects are planned at a depth that you're guaranteed to maintain. Plans that don't get maintained add very little value to the organization.

Projects and project teams are flexible and agile (i.e., they react to changes as needed). Regardless of methodology, projects must be responsive to change.

Recommended Action: Allow timelines and budgets to be re-estimated when scope changes. Then, project teams have no reason to be inflexible.

Evaluate the effectiveness of individual PM areas and sub-areas. For low scoring areas, follow recommended actions to start improvement efforts.
Overview: functions best when all team members are on the same page. This page shows your team’s alignment – their relative opinions and degree of consensus – on the various capabilities, procedures, and practices that determine your effectiveness. Use this information to facilitate knowledge transfer, leverage team member insights, address gaps and discrepancies, and optimize your PPM practices.

1. PLANNING SUFFICIENCY
   - Top Critics: Barry Cousins 5/6
   - Top Supporters: Matt Burton 4/6, Trevor Bieber 4/6, Travis Duncan 4/6

2. CHARTER
   - Top Critics: Travis Duncan 3/6, Barry Cousins 5/6
   - Top Supporters: Matt Burton 2/6, Trevor Bieber 2/6

3. STAKEHOLDER ANALYSIS
   - Top Critics: Matt Burton 2/6, Travis Duncan 4/6, Trevor Bieber 2/6, Barry Cousins 1/6
   - Top Supporters: Matt Burton 4/6, Trevor Bieber 5/6, Travis Duncan 5/6, Matt Burton 4/6

4. AGILITY
   - Top Critics: Matt Burton 3/6, Trevor Bieber 5/6, Travis Duncan 5/6
   - Top Supporters: Matt Burton 4/6, Trevor Bieber 5/6

5. REQUIREMENTS CURRENCY
   - Top Critics: Barry Cousins 2/6, Matt Burton 5/6, Travis Duncan 2/6, Trevor Bieber 5/6
   - Top Supporters: Barry Cousins 4/6

Conduct a Team Alignment Exercise

The team alignment exercise is essentially just a conversation between team members about how to standardize approaches, address gaps and discrepancies, and optimize PPM practices.

Keys to success:
- Follow an agenda. Your team’s time is valuable, so it’s important to be organized, efficient, and on-task. Keeping to a pre-determined agenda will help make the best use of your time, and will ensure that high priority items get covered first.
- Designate a moderator.Someone needs to structure the discussion, keep things moving. The moderator should also ensure that everyone is involved and has a chance to contribute; use the individual team member scores and comments as a basis for discussion or as a way of inviting a contribution.

Determine whether you and your peers agree on performance. Conduct a team exercise to build alignment and prioritize issues.
**PROJECT RESOURCING** - The quality and quantity of resourcing plays a key role in project success.

### PROJECT RESOURCING - WEIGHTING: 8/10

Projects are assigned enough people to satisfy the volume of work within the designated timelines.

**Smart organizations focus on the balance between supply and demand.**

**Recommended Action:** Allocate sufficient project resourcing to ensure that the timelines and budgets are realistic.

<table>
<thead>
<tr>
<th>Strongly Disagree</th>
<th>Strongly Agree</th>
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<tbody>
<tr>
<td>54%</td>
<td>46%</td>
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### VOLUME OF WORK - WEIGHTING: 9/10

**Overall, people do not have too much work assigned.**

Project work, support work, and ad-hoc work are often assigned in isolation of each other, leading to a sense that there is too much work.

**Recommended Action:** Allocate work and responsibilities across project, support, operational, administrative, and ad-hoc work via one process.

<table>
<thead>
<tr>
<th>Strongly Disagree</th>
<th>Strongly Agree</th>
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<tbody>
<tr>
<td>42%</td>
<td>58%</td>
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</table>

### SKILLS MATCH - WEIGHTING: 7/10

The most suitable resources get assigned for each project.

**Matching skills to requirements is a critical part of project success.**

**Recommended Action:** Despite having a strong skills-assignment alignment, seek opportunities to develop succession planning.

<table>
<thead>
<tr>
<th>Strongly Disagree</th>
<th>Strongly Agree</th>
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<tbody>
<tr>
<td>83%</td>
<td>17%</td>
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### PM RESOURCING - WEIGHTING: 6/10

Projects are assigned enough Project Manager time to support the demands of the PM role.

Many best practices only make sense if there is an official allocation of project management time.

**Recommended Action:** Calling someone the Project Manager doesn’t automatically give them time to manage the project. Be deliberate in allocating sufficient time for the duties expected of a project manager.

<table>
<thead>
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### CONCURRENT PROJECTS - WEIGHTING: 6/10

People are not assigned to too many projects at the same time.

Concurrent project assignments make it difficult to deliver on allocations.

**Recommended Action:** It’s difficult to effectively switch between projects. Consider assignments that make it possible to complete tasks before switching projects.

<table>
<thead>
<tr>
<th>Strongly Disagree</th>
<th>Strongly Agree</th>
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<tbody>
<tr>
<td>71%</td>
<td>29%</td>
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</table>

### SKILLS DEVELOPMENT - WEIGHTING: 6/10

People are given enough chances for skills development via funding and time allocation.

Keeping the team busy with no skills development is a short-term strategy.

**Recommended Action:** Most roles require frequent re-training and skills development opportunities. Ensure that this is explicitly funded and allocated.

<table>
<thead>
<tr>
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**Conduct a Team Alignment Exercise**

The team alignment exercise is essentially just a conversation between team members about how to standardize approaches, address gaps and discrepancies, and optimize PPM practices.

**Keys to success**

- **Follow an agenda.** Your team’s time is valuable, so it’s important to be organized, efficient, and on-task. Keeping to a pre-determined agenda will help make the best use of your time, and will ensure that high priority items get covered first.
- **Designate a moderator.** Someone needs to structure the discussion and keep things moving. The moderator should also ensure that everyone is involved and has a chance to contribute; use the individual team member scores and comments as a basis for discussion or as a way of inviting a contribution.
- **Document the discussion.** Be sure to record the key themes and insights of your discussion. Generate a list of next steps and follow up items, and assign timelines and accountability for these immediately.
- **Conduct follow up.** Without follow up, the team alignment exercise is probably a waste of time. Implementing and enforcing the outcomes of your alignment exercise are critical to realizing actual improvement.
**RISK MANAGEMENT - WEIGHTING: 8/10**

*"We routinely identify project risk and share proposed mitigation strategies with management and/or the PMO."*

A risk management strategy becomes more essential as the pace of change quickens and more of IT is external to the company’s network and premises.

**Recommended Action:** Once the portfolio throughput is documented and tracked, establish a systemic process for analyzing and mitigating risk.

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**COMMUNICATION FREQUENCY**

*"On average, how often do teams have communication meetings?"*

When project plans are more fluid and agile, more frequent communication is needed.

**Recommended Action:** With infrequent project communications meetings, ensure that you have ample escalation procedures in place for those important issues that arise between meetings.

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**PROJECT EXECUTION** - A high quality project portfolio depends on repeatable processes.

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**PLAN-ACTUALS DEPTH**

*"What is typically the smallest unit of task or work assignment?"

Planning is great, as long as you have time to maintain the plans.

**Recommended Action:** Keep a backlog of smaller, unassigned tasks that can be used to fill gaps between assignments to avoid the waste caused by unassigned resources.

**CLOSURE**

*"Who audits the closure of projects?"

Overall project success is improved by oversight of the closure process.

**Recommended Action:** Engaging the steering committee or portfolio owner in project closure is uncommon but extremely beneficial.

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**METHODOLOGY - WEIGHTING: 3/10**

*"What percentage of your project portfolio budget is consumed within each of these Project Management methodologies?"

Best practices can vary by methodology.

**Recommended Action:** A universal methodology is only warranted when all of your projects are extremely similar in their size, scope, tools, skills, and deliverables. Make sure that your standards are not getting in the way of throughput and quality.

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**STATUS UPDATES - WEIGHTING: 7/10**

*"Are project and task status updates proactively provided by team members, or do the Project Managers have to solicit them?"

Both Tactics are valid, but the team needs clarity on how updates are processed.

**Recommended Action:** It’s worth getting clarity with a consistent update methodology to ensure status updates are never sacrificed during busy periods.
**Reporting and Time Tracking**

**Details**

### Reporting

**Consistency - Weighting: 5/10**

- **Question:** All projects produce a consistent level of reporting at the project and portfolio levels.
- **Rating:** 75%
- **Recommendation:** The portfolio can’t be managed properly unless all of the projects yield the minimum amount of current information.

**Recommended Action:** Most of the value in reporting comes from the ability to contrast different projects against one another. Keep pushing to make reporting consistent, even if it’s not terribly detailed.

### Roll-Ups - Weighting: 3/10

- **Question:** To what extent is the project-level reporting a rolled up calculation based on the underlying task details?
- **Rating:** 29%
- **Recommendation:** The data behind task and date roll-ups is extremely complex and costly to maintain.

**Recommended Action:** What’s truly important is the currency of progress and status information. Add as much detail and rigor as you can, but only as much as you can guarantee will always be maintained through any crisis or organizational change.

### Portfolio Content - Weighting: 10/10

- **Question:** How often do you publish accurate portfolio reporting?
- **Rating:** 75%
- **Recommendation:** Current and accurate report content is needed for sound decision making.

**Recommended Action:** Currency is key to portfolio information being useful. When executives are given reports with invalid data, they will stop relying on the PMO publications. Keep pushing to make this information as current as possible.

### Time Tracking

**Non-Project Time - Weighting: 4/10**

- **Question:** We have a tracking system for time spent on other work such as support, administration, service requests, and unofficial projects.
- **Rating:** 35%
- **Recommendation:** If you’re trying to assess the overall capacity of the organization for project work, then it’s essential to understand the non-project time.

**Recommended Action:** Tracking non-project time is mostly valuable as a distinction from project time. Ensure that you’re getting value from any time data that gets tracked in the future.

**Project Time - Weighting: 4/10**

- **Question:** We have a tracking system for time spent on official projects.
- **Rating:** 67%
- **Recommendation:** If you’re reconciling the estimates against actuals, a good time accounting system is essential.

**Recommended Action:** Without timesheet data, project and portfolio reporting is estimated and abstracted. This inherently less precise approach can reduce cost and complexity of running the portfolio and reduce the need for commercial project and portfolio management software.
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Your team agrees that this works well. Maintain this optimal state.

Your team is in consensus that this isn't very effective. Follow the recommendations in this report to drive improvement.

Although this has some supporters, most team members don't consider it very effective. Use the recommendations in this report to get the rest of the team onboard.

This is generally seen as effective, but not by everyone. Leverage the insights and benefits identified by the majority to improve the experience of the minority.

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For questions in this area whose answers use text options rather than a numerical six-point evaluation scale, the preceding details pages display only the response of the person the report was prepared for. If this person didn't complete the survey, the response of the person with the highest-ranking role is displayed instead. Because these questions are more factual than interpretive, they do not appear in the Team Alignment pages.

STATUS UPDATES
Respondents: Barry Cousins
Respondents: Matt Burton, Trevor Bieber, Travis Duncan

Insight: Your team agrees that responsibility for task status updates is unclear. Decide whether these should be proactively provided by the team or solicited by the Project Manager, and make sure everyone knows their role going forward.

RISK MANAGEMENT
Top Critics
Top Supporters
Barry Cousins 2/6 Matt Burton 4/6
Trevor Bieber 2/6
Travis Duncan 2/6

ROLL-UPS
Top Critics
Top Supporters
Matt Burton 2/6
Trevor Bieber 2/6
Travis Duncan 2/6
Barry Cousins 1/6

CONSISTENCY
Top Critics
Top Supporters
Barry Cousins 5/6
Travis Duncan 5/6
Matt Burton 4/6
Trevor Bieber 4/6
See how your performance is changing over time. Use this to communicate success to your team or stakeholders.