Project Management Learning Needs Analysis

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ASSESSMENT SURVEY

An initial set of questions to allow an organization to evaluate learning needs for project management

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Basic Version 2.0 – 2016
This Survey is Updated Periodically, the Latest Version can be Found at www.manageprojectsbetter.com

Developed and Provided by

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NOTE
This survey is intended to provide only an initial and very top level view of potential improvement and learning needs and is not a substitute for a comprehensive project management evaluation also available. See "Summary" for more details.

USAGE LIMITATIONS
This survey is provided to the recipient for the purpose of performing a quick and top level evaluation of project management functions within the recipient's organization. The recipient is authorized to copy, distribute and use this document within their respective organization for this stated purpose. The sale or any other commercial purpose other than stated above is strictly prohibited.

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Summary and Intent

To properly focus any learning initiative, a baseline of needed, existing and missing skills and knowledge must be established. This assessment baseline provides the information needed to identify the requirements for new learning topics that best meet the needs of the organization and its employees. To drive the identification of needed PM learning topics and to prioritize those learning topics, a survey is conducted and analyzed by a PM expert. The result is a definition of prioritized learning needs that can drive near term and far term learning efforts.

PM Survey Assessment Types

Many types of evaluations and assessments are employed for different reasons. General assessment types are listed below and the nature of this survey is noted. This survey is a "Type 3" assessment.

Type 1 Survey - Organization PM Capabilities Maturity Assessment – This is an assessment of the organization's PM infrastructure and evaluates infrastructure elements including PM processes, tools, systems, role definitions, team work and other organization level topics such as the overall project environment. This type of survey is used to identify organization wide issues, root causes and eventually improvements. (See

Type 2 Survey - Individual Project Manager Knowledge and Skills Assessment – This is an assessment of the knowledge and skills of a given project manager independent of the organization maturity level or the skills of other PMs. This is used for individual development planning, job descriptions, hiring, promotions and assigning PMs to the right projects.

<u>Type 3 Survey - PM Learning Needs Assessment</u> – This is an assessment of multiple areas needed to form an overall picture of what types of things can be improved through PM learning initiatives. This type of survey will include questions of the two above survey types but will focus the questions on understanding learning needs. Learning needs in multiple areas can result based on the survey detail results and the content of the post survey interviews:

- A – Learning needs of project managers
- B – PM learning needs of project team members
- C – PM learning needs of leadership
- D – PM learning needs of the organization overall

Basis of Survey Content

The fundamental skill and knowledge areas related to project management are very well known by industry, government and academia. In addition, many studies have consisently shown what areas of project management are most prone to being root causes of project challenges and where improvements can be of most value. The questions contained in this survey combine both of these critical PM skill sets. A core set of 25 questions exists in the non-tailored survey that can be used "as is" or can be the basis for a survey tailored to the client's project environment. (The latter is recommended).

LEARNING NEEDS SURVEY
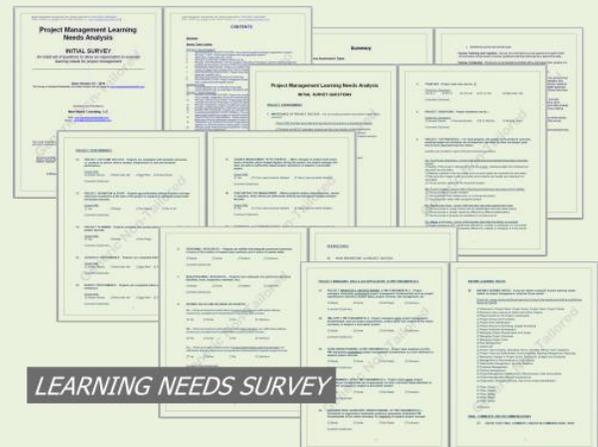
The Analysis Process

- **Client Meeting, Survey Overview, Tailoring Needs and Logistics** - Survey provider meets with the receiving organization to accomplish the following:
  - o Discuss the survey and learning needs analysis scope, intent and implementation process
  - o Review the questions in this generic survey and determine if question modifications are needed to better align with organization specifics

- o   Discuss the set of individuals that will be survey respondents and potential interview subjects and if different levels within the organization will respond to the survey as separate groups
- o   Identify the logistical details associated with the intended respondents that may include pre-survey notifications, communication of the value of the survey to the organization and respondents, promise to share results with the respondents and the timeframe for survey completion
- o   Identify the survey tool will be used

- **Survey Tailoring and Logistics** - Survey provider tailors survey questions to match client environment. A final review of survey questions with the client may be a part of this step.

- **Survey Conducted** - The survey is conducted most often with a web based tool, usually in a time period of one week.

- **Raw Results Compilation** - Survey provider compiles the raw survey results.

- **Interviews** - Survey provider interviews selected respondents usually one or two groups from each level in the organization (example: one or two groups of PMs, team members and leadership). These post survey interviews allow respondents to amplify what was captured in the survey and offers the survey provider to ask clarifying and more in-depth questions. Initial findings from a review of the raw survey results might be surfaced in these interviews to acquire respondent reaction to this set of initial information.

- **Results Analysis, Findings and Recommendations Preparation** - Survey provider analyzes the survey results and the results from the interviews and prepares a set of findings and recommendations for new learning initiatives. Recommendations often include training options but can also include other learning activities such as coaching, rotating assignments, special assignments and other learning opportunities.

- **Results Briefing to Client** - Receiving organization is provided a presentation of the results and recommendations. The presentation is also an opportunity to question the survey provider on the details of the analysis, findings and recommendations

- **Final Report to Client** - A final report is prepared by the survey provider and forwarded to the organization.

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