



# Competence Assessment


- Performed by the individual or by the organization (e.g. by PMO or management)
- Based on evidences against the PMCD Framework performance criteria
- Could use different levels of detail for each competence area (unit, element or criteria)
- The organization may prescribe qualitative, quantitative and interpretative methods to be used
- When using a holistic approach, strength in one area could obscure one or more gaps in other areas



# Assessment Rigor

- **Low Rigor** – typically involves casual self-assessment, or informal assessment against the competence criteria.
- **Medium Rigor** – more detailed, usually done by a manager or peer, adding external feedback to individual's perspective to create a 360° view.
- **High Rigor** – in-depth assessment, usually performed by qualified independent assessors, involving analysis of several recent projects to gather relevant evidence.

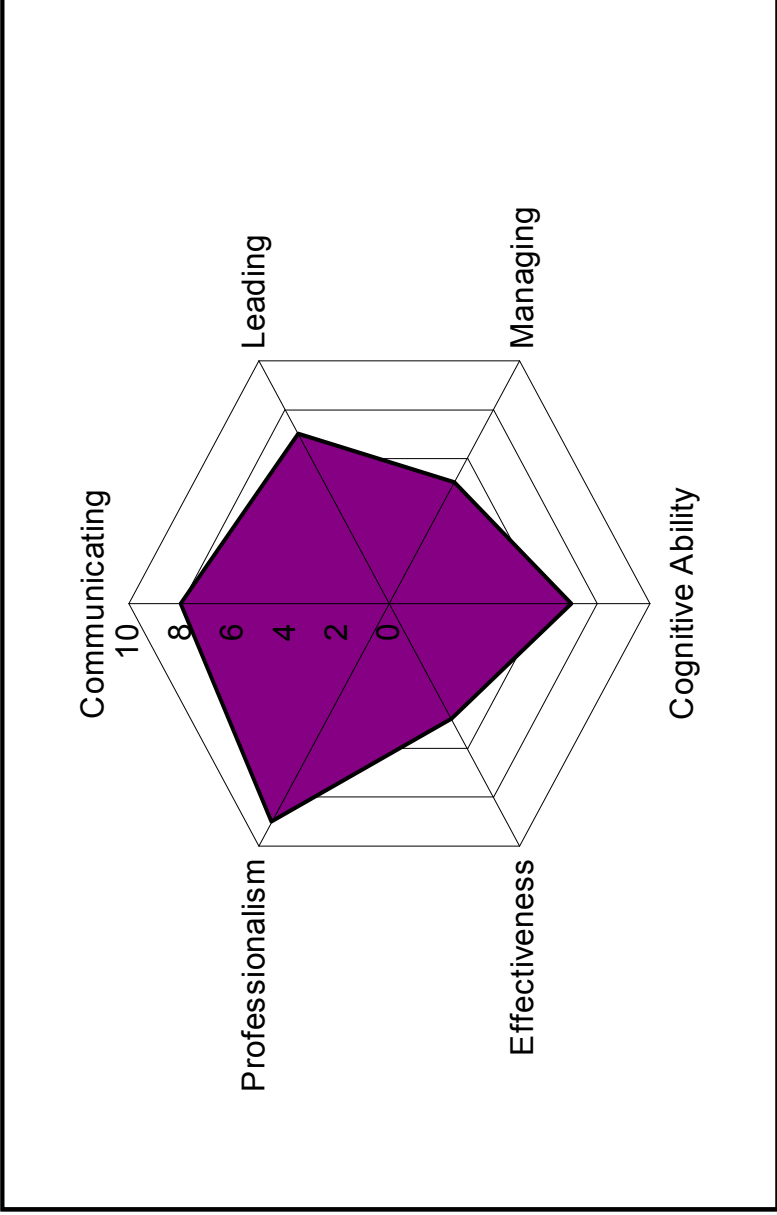
# Assessment Example



Personal Competencies		Score
<b>Communicating</b>		<b>8.00</b>
<b>Leading</b>		<b>7.00</b>
<b>Managing</b>		<b>5.00</b>
	Builds and maintains the project team	5.00
	Plans and manages for project success in an organized manner	7.00
	Resolves conflict involving project team or stakeholders	3.00
<b>Cognitive Ability</b>		<b>7.00</b>
<b>Effectiveness</b>		<b>4.75</b>
	Resolves project problems	8.00
	Maintains project stakeholder involvement, motivation and support	4.00
	Changes at the required pace to meet project needs	5.00
	Uses assertiveness when necessary	2.00
<b>Professionalism</b>		<b>9.00</b>

# Assessment Example

Personal Competencies	Score
Communicating	8.00
Leading	7.00
Managing	5.00
Cognitive Ability	7.00
Effectiveness	4.75
Professionalism	9.00



# Assessment Example

**Element 6.1:** Actively listens, understands, and responds to stakeholders

Performance Criteria	Types of Evidence	Status	Comments
.1 Actively listens	Survey results from stakeholders	medium	no complaints, but no positive feedback either
	Documented observations from communication	good	not interrupting others while speaking, nodding to show understanding
	Documented feedback on empathy and understanding towards others point of view	low	often focused on the words, missing the emotions reflected by the voice
.2 Understands explicit and implicit content of communication	Documented observations from communication	medium	rephrasing stakeholders messages to demonstrate understanding typically generates agreement
	Documented confirmation that messages were received and understood	very good	almost no situation when a stakeholder needed to repeat the message to clarify misunderstandings
.3 Responds to and acts upon expectations, concerns and issues	Documented responses to issues important to others (i.e. Issues Log)	good	issue log maintained accurate and timely
	Change requests	very low	no documentation on change requests, their analysis and results
	Survey results from stakeholders	medium	no complaints, but no positive feedback either

# Development Plan

- Individual strengths and areas to be addressed
- Prioritized development areas
- Using different methods:
  - Mentoring
  - Coaching
  - Peer to peer
  - Role playing
  - On the job training
  - Formal training
  - PMI Education programs

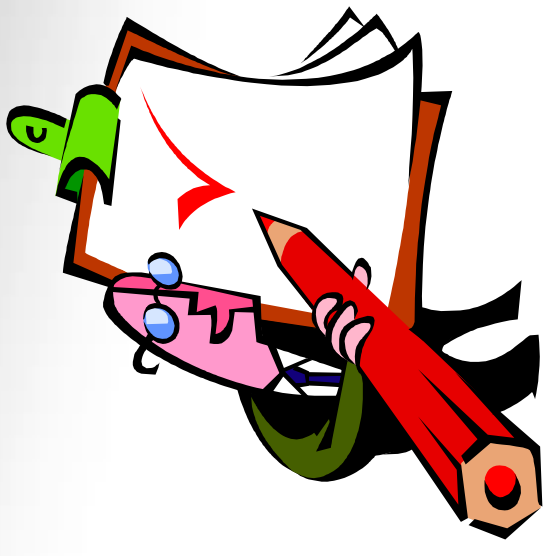
# Development Plan Example

Line No.	Label (Known as)	PMCDF Reference	Learning Outcome (Behavior) required	Learning activity . Type	Target Date	Mentor Name	Pre - Development	Post Development
21	Action to Influence	Personal 2.5.1	Continually reviewing where persuasion is likely to be needed and the method most likely to succeed	Mentoring /Coaching	Dec 2007	Arthur Wright	Below Expectation June 16 2006	
22	The level of detail required to define the project scope	Performance 2.1.1	Develop the use of WBS to breakdown project scope	Training course on use of WBS	Oct 2006	n/a	Below Expectation June 16 2006	

# Execute Plan

*The project manager needs to execute this plan just as a project manager would execute any project plan.*

- Plan owned by the PM
- Medium and long term goals
- Targets and milestones
- In parallel with project work
- Engage support from others
- Monitor progress and take corrective actions



# Development Plan Example

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22	The level of detail required to define the project scope	Performance 2.1.1	Develop the use of WBS to breakdown project scope	Training course on use of WBS	Oct 2006	n/a	Below Expectation June 16 2006	Meets Expectations Oct 2006



# Evaluate Plan


- Iterative process to develop competence as a project manager
- Each iteration of the Competence Development Plan should be treated as a project in itself.
- As with any project there needs to be a formal review of plan's success
- Lessons learned and action items



# Evaluate Plan

Questions that need to be asked include:

- Was the plan suitable?
- Did the plan deliver the outcomes needed?
- Was there sufficient support for the development plan?
- Were there activities that should have provided better outcomes?
- Can others now use the same plan?



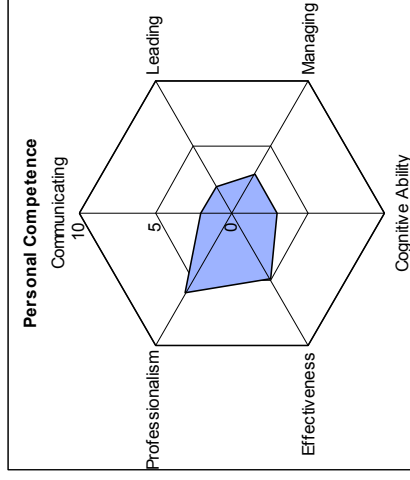
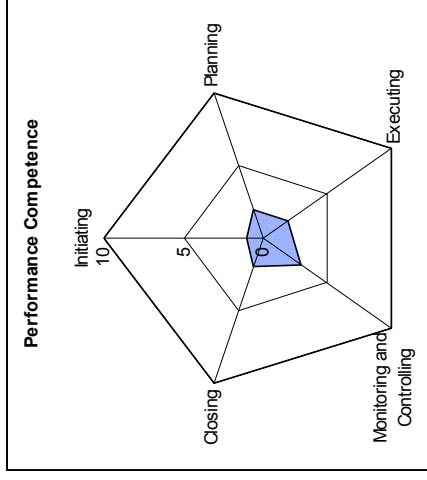
# A Guide to the Top



# Project Assistant

Performs routine tasks like updating the schedule, monitoring people's availability, centralize and monitor costs and so on. Usually evolves in a project coordinator role.

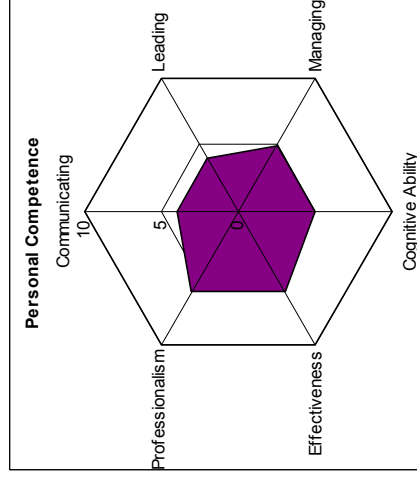
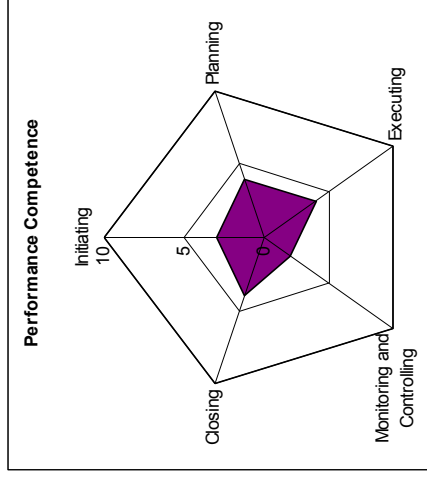
- **Responsibility:**
  - Collects and archives project forms (NDAs, copyright, technical setup etc)
  - Collects and centralizes regular status reports, time sheets, expenses etc.
  - Maintains project documents repository
  - Other project administration tasks
- **Authority:**
  - Always under the guidance and supervision of the Project Manager
  - Can initiate recurring tasks of pre-defined repetitive activities (e.g. call for status reports, timesheets or expenses)
  - Cannot take decisions without the Project Manager
- **Competence:**
  - General exposure to Project Management principles
  - Organized, detail oriented
  - Good communication skills for interaction with team members



# Project Coordinator

Without extensive experience and usually without formal project management training, a project coordinator handles sub-projects or simple independent projects under supervision, mostly acting in a facilitation and reporting capacity.

- **Responsibility:**
  - Coordinates and monitors tasks execution and progress
  - Provides consolidated status reports to the PM
  - Facilitates work by resolving minor team member issues
  - Escalates to the PM risks and issues with potential significant impact
  - Monitors project costs and resource usage
- **Authority:**
  - Activates under the supervision of a project or organizational manager
  - Manages detailed activities in sub-projects or small projects
  - Assigns tasks to team members and require progress reports
  - Can implement corrective actions for small project deviations
- **Competence:**
  - General knowledge of Project Management principles and methodology
  - Knowledge of project scheduling and monitoring tools
  - Understanding of quality and cost control processes
  - Ability to organize the work for self and others
  - Good communication skills for interaction with team members



# Project Leader

A technical expert that might have no formal project management training, able to deliver good products but not always achieve project success – in most cases because deficiencies in the interaction with stakeholders leads to scope creep or gold-plating.

- **Responsibility:**

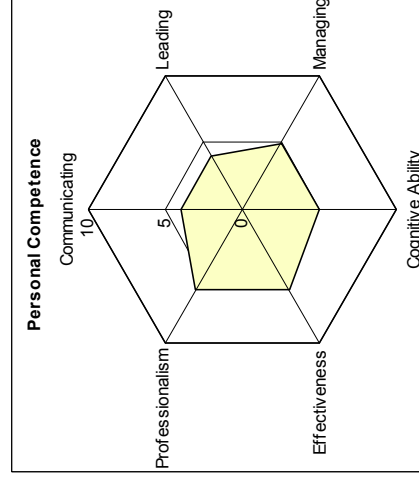
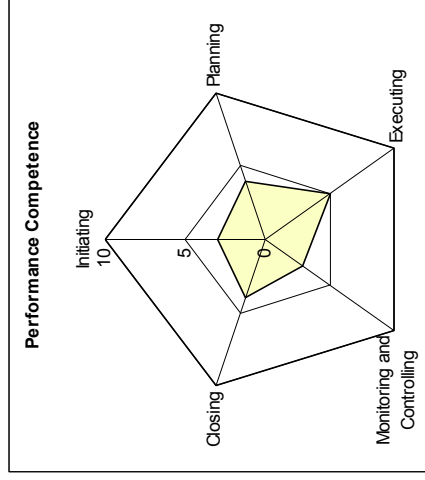
- Participates in project planning and estimating
- Coordinates and monitors tasks execution and progress
- Provides consolidated status reports to the PM
- Provides technical support to team members
- Escalates to the PM risks and issues with potential significant impact

- **Authority:**

- Activates under the supervision of a project or organizational manager
- Has autonomy in managing end-to-end sub-projects or small projects
- Has authority to assign tasks to team members and require progress reports
- Can implement corrective actions for small project deviations

- **Competence:**

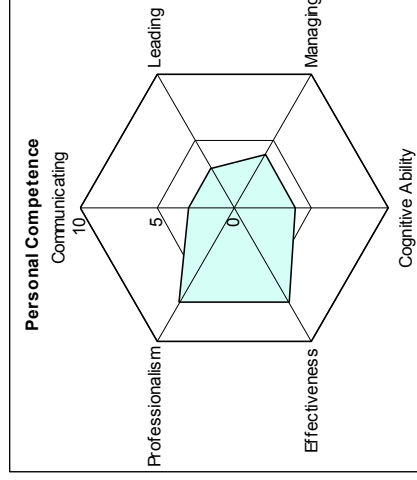
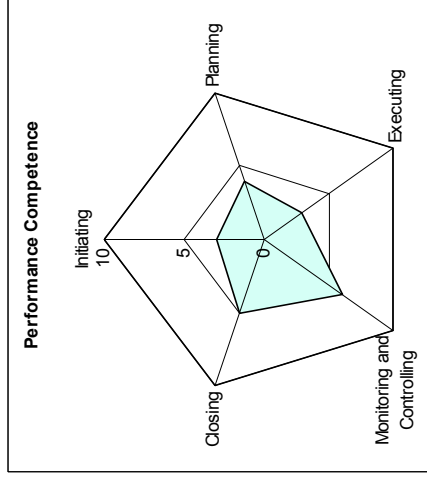
- Expert level in the project technical area
- General understanding of Project Management principles
- Knowledge of work estimating techniques
- Ability to organize the work for self and others
- Basic leadership and general management skills
- Basic communication and negotiation capabilities



# Project Controller

With formal training in project management and/or specific areas (mostly scheduling, cost and risks) performs a monitoring and control function of specific project perspective(s).

- **Responsibility:**
  - Collects, analyses and interprets performance data
  - Monitors tasks execution and progress
  - Provides consolidated status reports to the PM
  - Escalates to the PM risks and issues with potential significant impact
- **Authority:**
  - Activates under the supervision of a project manager
  - Ensures collection, processing and approval processes
  - No direct authority over project staff
- **Competence:**
  - General knowledge of Project Management principles and methodology
  - Knowledge of project scheduling and monitoring tools
  - Understanding of quality and cost control processes



# Junior Project Manager

Typically having formal project management training but not extensive experience, a junior project manager handles autonomously small independent projects, usually under the guidance or mentorship of a more senior project manager.

- **Responsibility:**

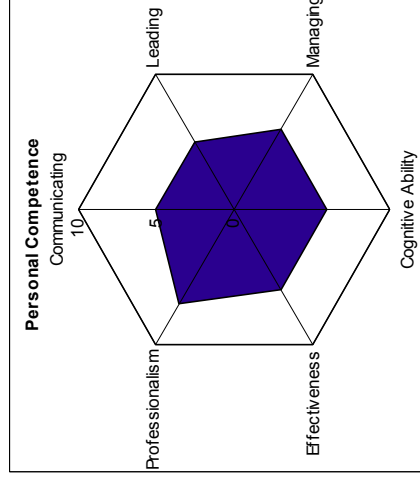
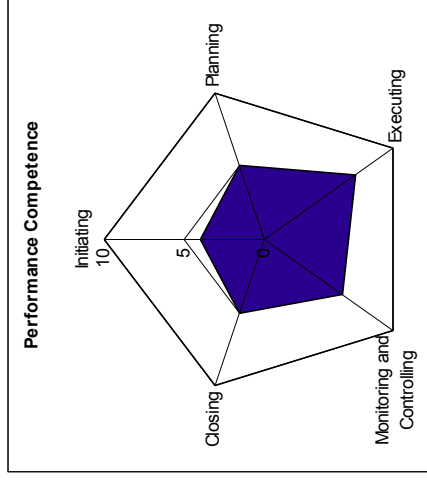
- Performs overall project planning based on predefined Charter
- Defined, estimates and schedules project work to achieve the scope
- Coordinates and monitors tasks execution and progress
- Provides consolidated status reports to stakeholders
- Takes corrective actions as required to keep the project on track

- **Authority:**

- Reports to a project executive or sponsor, normally mid or high management
- Has autonomy over project team within chartered boundaries
- Can negotiate scope, resources and schedule changes with stakeholders
- Assigns tasks to team members and manages work
- Implements corrective actions for small project deviations

- **Competence:**

- Knowledge of Project Management principles and methodology
- Knowledge of project scheduling and monitoring tools
- Understanding of quality and cost control processes
- Stakeholders management through negotiation and conflict resolution
- Good communication skills for interaction with team members



# Project Manager

Even if "all scope, in time and within budget" target remains sometimes out of reach, a project manager has the tools, knowledge and experience to drive the project toward project success by applying appropriate techniques and behaviors.

- Responsibility:

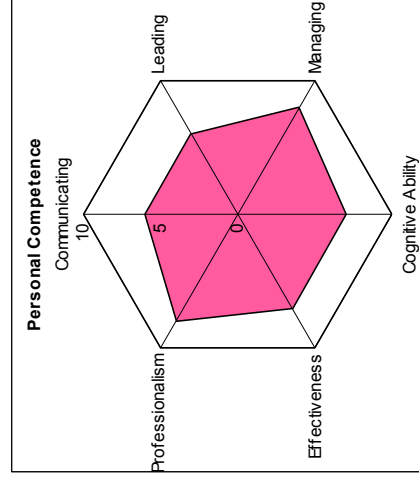
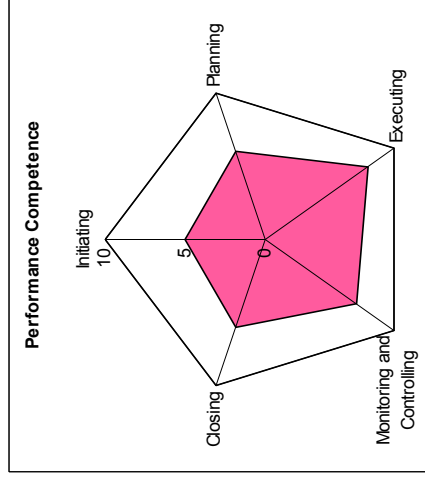
- Performs overall project planning based on predefined Charter
- Defined, estimates and schedules project work to achieve the scope
- Manages, monitors and forecasts project execution
- Takes corrective actions as required to keep the project on track.
- Ensures effective communication with internal and external stakeholders
- Projects lifecycle improvement through lessons learned, project archives, etc

- Authority:

- Manages end-to-end tactical projects of various size
- Has authority over the project team as defined in the project charter
- Reports to a project executive or sponsor, normally mid or high management
- Has autonomy within project boundaries
- Can negotiate scope, resources and schedule changes with stakeholders

- Competence:

- In-depth knowledge of PM methodology, tools and techniques
- Leadership and general management skills
- Stakeholders communication, negotiation, influencing, persuasion, etc
- Consistent professional behavior in all activities



# Senior Project Manager

Manage complex projects based on sound methodological knowledge as well as advanced people skills, seeking project's alignment to business needs even beyond chartered scope statement and realistically adjusting predefined organizational processes and policies.

- **Responsibility:**

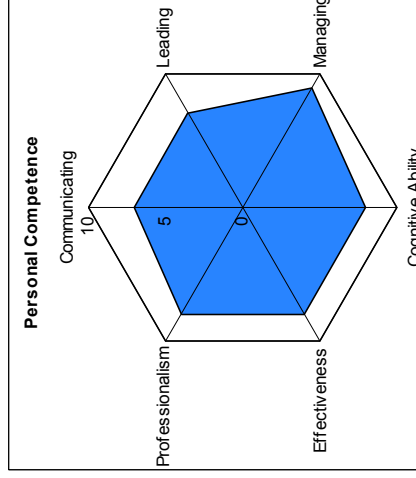
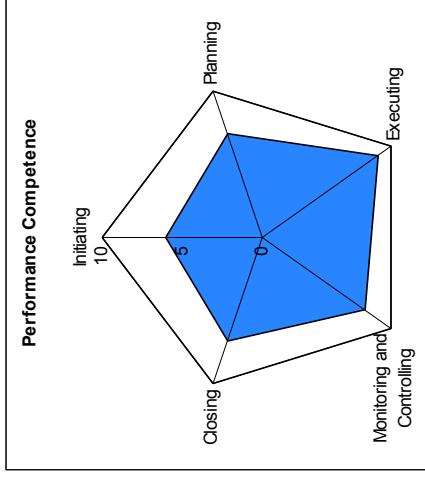
- Involved in projects initiation and strategic project alignment
- Guides, mentors and/or performs project planning for all knowledge areas
- Takes corrective actions as required to deliver complete scope, at desired quality, in time and within budget
- Process and methodological improvement

- **Authority:**

- Manages end-to-end strategic projects, large in scope, budget and team
- Reports to an organizational manager or a program/portfolio manager.
- Coordinates project leaders or coordinators assigned to deliver subproject of a complex project managed by the senior project manager
- Proposes changes to the PM methodology, framework or best practices

- **Competence:**

- Expert knowledge of PM methodology, tools and techniques (typically PMP)
- Advanced leadership and general management skills
- Advanced communication, negotiation, conflict resolution capabilities
- Understanding of organizational environment and project's alignment to corporate objectives



# Project Director

Coordinates a number of projects (and their corresponding project managers), usually acting on behalf of an executive or project sponsor, or of the client or user community group. Typically focused on feasibility and efficiency, also requires significant PM knowledge

- **Responsibility:**

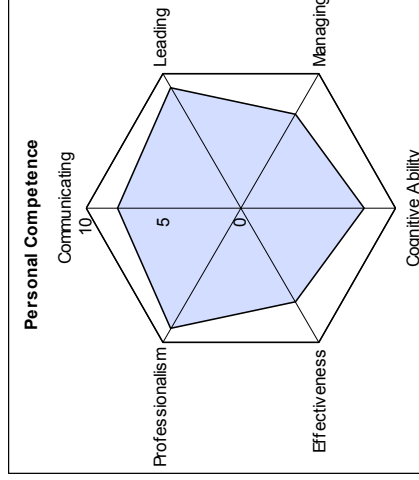
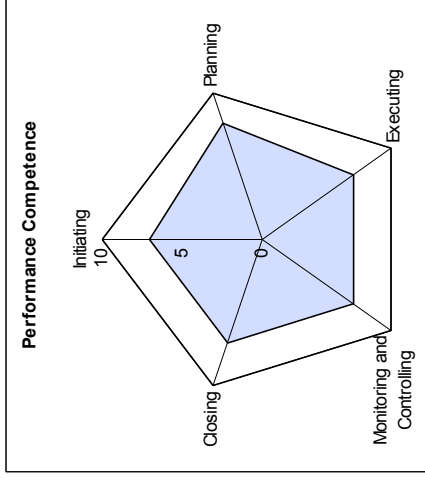
- Projects initiation and strategic project alignment
- Guides, mentors and/or coordinates project managers
- Ensures alignment with business objectives and needs
- Process and methodological improvement

- **Authority:**

- Coordinates multiple projects from a strategic perspective
- Reports to an executive or a program/portfolio manager.
- Ensures stakeholders expectations management, including contractual negotiations and performance
- Proposes changes to the PM methodology, framework or best practices

- **Competence:**

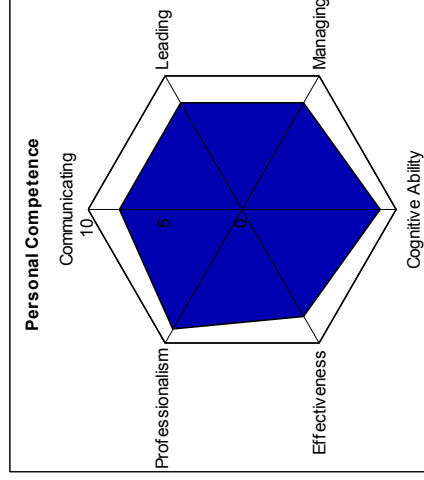
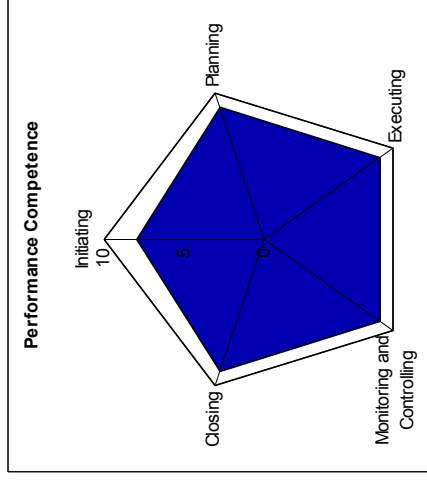
- Demonstrated understanding of organizational environment and projects' alignment to corporate objectives
- Advanced leadership and general management skills
- Advanced communication, negotiation, conflict resolution capabilities
- Knowledge of PM methodology, tools and techniques



# SME Project Manager

Typically part of a PMO, has advanced overall project management knowledge (PMP) and demonstrated expertise in one or more specialized areas such as methodologies, cost control, scheduling, projects and processes quality improvement.

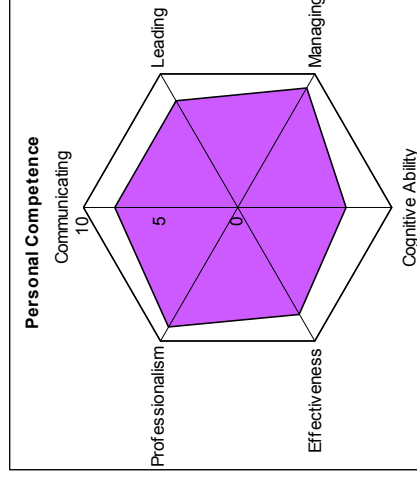
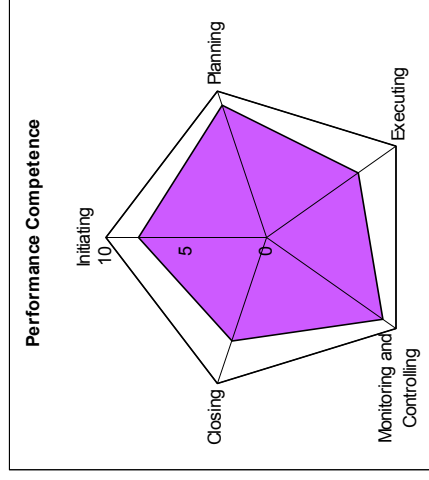
- **Responsibility:**
  - Guides, mentors and/or coordinates project managers
  - Process and methodological improvement
  - Participates in organizational process improvement
- **Authority:**
  - Defines and/or approves changes to the PM methodology, framework or best practices
  - Approves methodology adjustments for specific projects
- **Competence:**
  - Advanced knowledge of PM methodology, tools and techniques
  - Expertise in one or more knowledge areas
  - Ability to coach, mentor, train other project managers



# PMO Manager

Combining organizational and project management knowledge the PMO Manager ensures development, application and advancement of project management principles, methodology and framework throughout the enterprise.

- **Responsibility:**
  - Manages members of the PM Office
  - Guides, mentors and/or coordinates project managers
  - Negotiates with executives the role and responsibilities of PMO in organization
  - Participates in organizational process improvement
- **Authority:**
  - Time and activities assignment of PMO members
  - Endorses or approves projects initiation
  - Approves changes to the PM methodology, framework or best practices
  - Approves methodology adjustments for specific projects

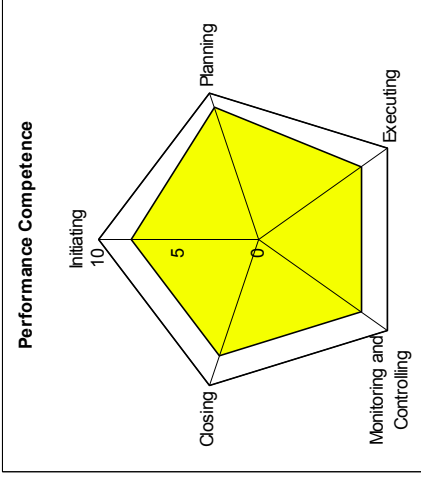


- **Competence:**
  - Organizational management abilities
  - Advanced knowledge of PM methodology, tools and techniques
  - Ability to manage, coach, mentor, train other project managers
  - Advanced communication skills in negotiation, influencing, persuasion etc

# Program Manager

As typically considered still a tactical role it requires solid project/program management knowledge, but also the ability to understand the business objectives that program has to achieve, and its alignment within the overall organizational strategy

- **Responsibility:**
  - Ensure alignment of subordinated projects with business objectives
  - Prioritization and assignment of shared resources to program components
  - Assessment and monitoring of projects business and financial performance
  - Monitors program components relationships and dependencies, as well as overall integration and issues resolution

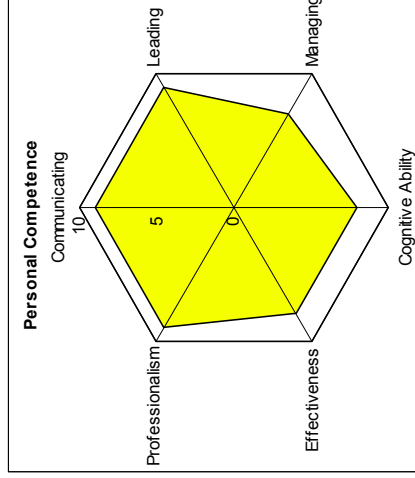


- **Authority:**

- Coordinates the PMs delivering individual projects within the program
- Has autonomy within the program boundaries, under the guidance of an organizational executive or of a portfolio manager
- Negotiates scope and schedule adjustments within reporting structure
- Process and methodological tailoring to better fit program's particularities

- **Competence:**

- Expert knowledge of project and program management methodology, tools and techniques
- Strong tactical planning and leadership skills
- Strong communication, negotiation, conflict resolution capabilities
- Advanced understanding of corporate environment and objectives



# Portfolio Manager

Mostly concerned with business performance analysis, authorizing or not projects initiation or continuance at predefined phase gates, efficient distribution of organization's resources to achieve maximum results in terms of strategic achievements.

- **Responsibility:**

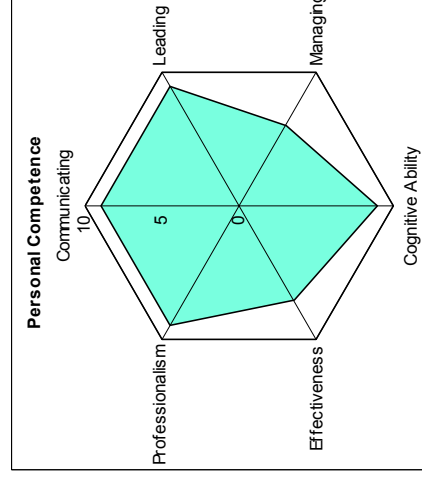
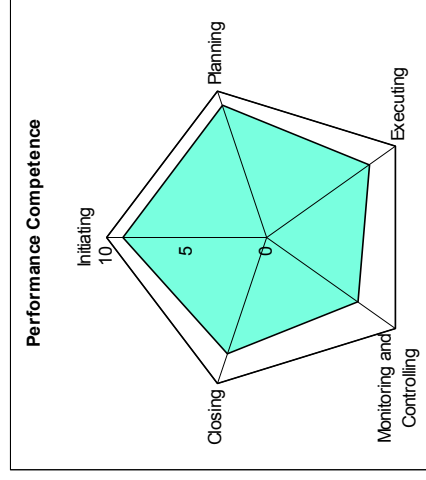
- Strategic management of portfolio components (projects and programs)
- Assessment and monitoring of business and financial performance
- Authorizes and manages portfolio component relationships and dependencies, as well as overall integration and issues resolution
- Ensures distribution of organizational resources between components.

- **Authority:**

- Coordinates project, program and line managers within the portfolio area
- Has autonomy with portfolio limits, reporting to an executive committee
- Negotiates projects initiation based on performance and resources
- Institutes adequate controls for underlying programs and projects
- Proposes enhancements to portfolio management methodology/framework

- **Competence:**

- Project, program and portfolio management methodology and framework
- Business acumen with strong strategic visioning and tactical planning
- Objective decision-making ability, based on strategic objectives priority, business performance analysis and resources availability
- Strong communication, negotiation and influencing capabilities





# Summary

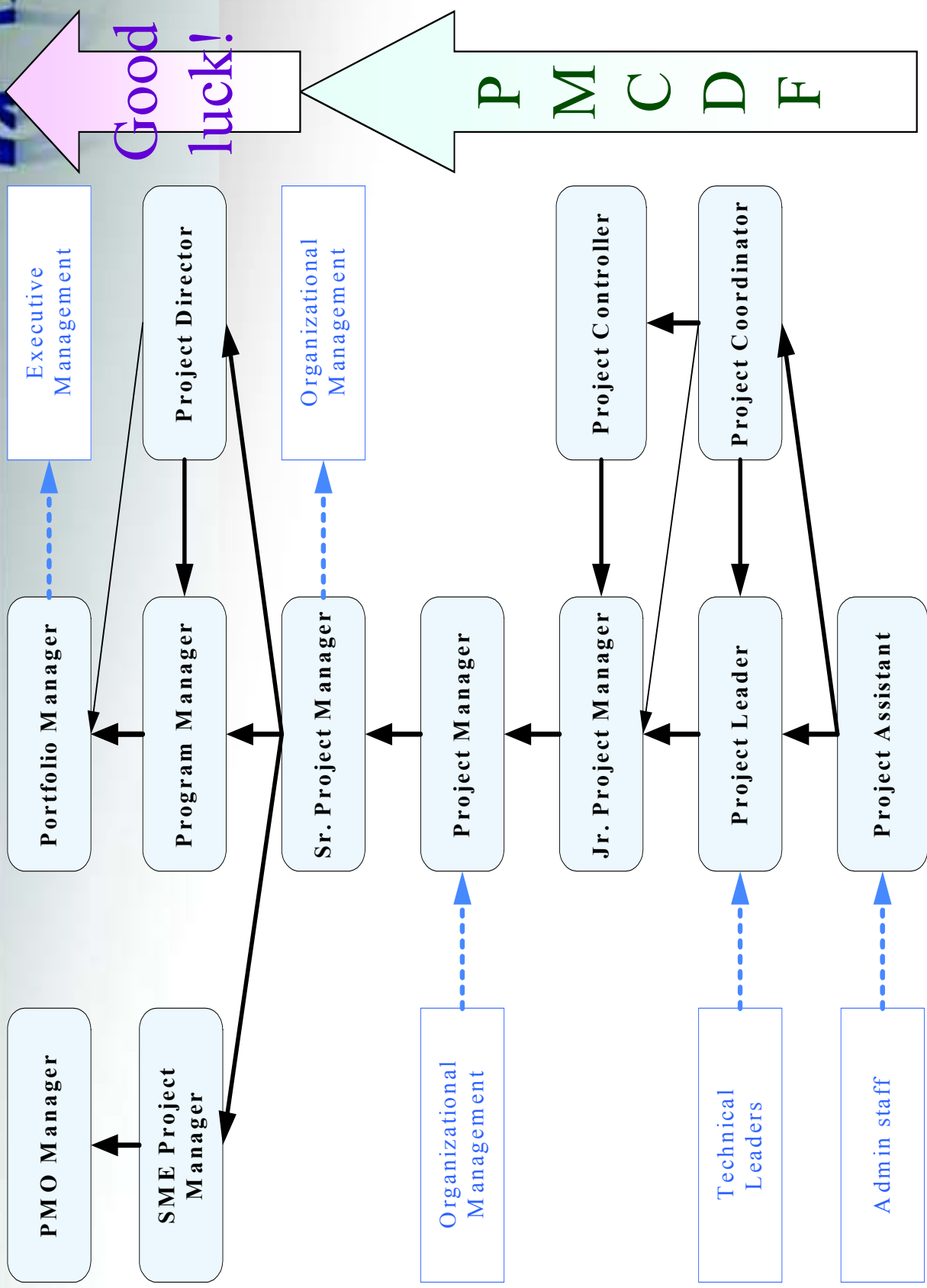
# The Framework

- The PMCD Framework defines the Performance and Personal Competencies required for a competent project manager.
- The PMCDF-Second Edition was developed to provide both individuals and organizations with guidance on how to assess, plan and manage the professional development of a Project Manager
- Each person or organization should customize the framework to its own specific needs.

# The Process

- Identify the target and specific competencies required for that position.
- Assess current level of competence, identify gaps, plan development, execute the competence development plan and then repeat the process.
- Use of the framework will provide a structured approach to the continuing journey of competence development for individuals as well as organizations.

# Career Path



# Questions?



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