

## Learning needs analysis

What the professionals need to learn comes from an analysis of organization's requirements and specified areas of improvements. These areas for improvement can be ascertained through, say:

- Market and regulatory needs analysis
- Customer feedbacks/ competitor analysis
- Technology skills upgradation requirements
- Internal analysis by PMO or through maturity assessment results as from, say. P3M3
- Senior management requirements based on their experience and perceptions
- Internal analysis done by PM community, HR or similar groups.

A learning roadmap can be created for the cohort (of say, team managers, project managers, program managers, portfolio managers, senior management etc). For instance, an organization, which wants to strengthen its risk management capabilities can commission specialised trainings relating to this topic and assess the outcomes.

There are couple of principles which go with this learning needs analysis.

- a) The outcomes after the learning and its application should be set (or agreed to) by the managers of participants. These outcomes can relate to the work which is actually being done by the participants - with potential for improvements.  
For instance, some of the illustrative outcomes are:
  - i) **Team Manager**: Be able to implement the work packages/ products allocated to them by the project manager. While doing this implementation, necessary quality requirements to be adhered to and the scope should be completed within specified budget/schedule
  - ii) **Project Manager**: Be able to design a project management plan, considering the project triple triangle, involving the stakeholders and risks. Execute the project by allocating work to the team and controlling their progress. Produce end deliverable of the project and transition to the concerned user (including any transition and support activities involved.)
  - iii) **Program Manager** Understand the organizational vision, mission, strategic objectives/ goals and the benefits expected out of the current program. Design the target operating model in discussions with impacted functional users. Identify which projects to be executed to realize the required outcomes and benefits, their dependencies and the timings. Factor in risks and stakeholder expectations to design the program management plan. Implement it with mid-course corrections as needed with integration of multiple outputs. Perform transition management to ensure benefits get realized. Incorporate Lessons learnt and archive the documentation

- iv) **Portfolio Manager:** Understand the organizational vision and mission, design the portfolio (or a sub-portfolio) to achieve the strategic goals and objectives. Identify the components to be taken up in the portfolio, prioritize and balance them to match with fundflows and requirements. Manage high level capacity and capability enhancement - including PPM competency and maturity enhancement.

Following are the major steps in the learning needs analysis:

- a) Agree on the roles to be covered and the outcomes to be achieved for these roles (like representative roles given for team manager, project manager etc given above)
- b) These outcomes need to be agreed by the manager or the competency enhancement or L& D team of the client with the consultant
- c) These outcome measures should be linked to how well the job is done. Metrics or KPIs can be associated to measure the outcomes - as per examples given below
- d) It is possible that the success standards in a competence test are set higher than those set in learning objectives
- e) The outcomes are linked to Knowledge(K) , Skills (S) and Attitude (A) factors for a proper assessment. Production of the KSA charts is a good way of ensuring the outcomes are realized through a cause and effect' linkage.

Few representative KSA charts for PPM role are given here for team manager, project manager and the program manager for illustration. Similar charts for other roles can be designed in consultation with users.

**A) Team Manager - representative KSA chart**

Outcome area	Robust Quality Management for a team
A Learning objective (associated with the outcome)	The team manager is able to apply right quality standards applicable for the assigned product for development and testing
Knowledge related to the learning objective (associated metric)	Knowledge of applicable quality standards like ISO, CMMI or other industry standards/ (Scores in quality management module in tests)
Skills factor/ (metrics)	How the generic QM standard is customized for the project, tailored to the scale of the project and company needs ? ( Review of QM artifacts for the project - including Quality management plan, Quality register, Quality related processes etc. Interviews with the team manager on applied knowledge to the project environment)
Attitude/ (metrics)	How quality management is applied in repeated projects? ( Feedbacks from project managers of the team managers/ documented quality metrics for the project)

Note: There could be more outcome areas for the team managers such as understanding of correct product lifecycle such as agile, configuration management, testing and so on. Likewise for each outcomes, multiple learning objectives could be noted. However, for each learning objective, typically one set of KSA factors get associated.

### **B) Project Manager - representative KSA chart**

Outcome area	Risk management for the project
A Learning objective (associated with the outcome)	The project manager is able to assess and address risks appropriately for the project context
Knowledge related to the learning objective (associated metric)	Knowledge of applicable risk management standards and processes (Scores in risk management (RM) module in tests)
Skills factor/ (metrics)	How the generic RM standard is customized for the project, tailored to the scale of the project and company needs ? ( Review of RM artifacts for the project - including Risk management plan, Risk register, risk related processes etc. Interviews with the project manager on applied knowledge to the project environment)
Attitude/ (metrics)	How risk management is applied in repeated projects? ( Feedbacks from program/ delivery managers of the project managers on how effectively risks were managed in a project )

### **C) Program Manager - representative KSA chart**

Outcome area	Benefits management for the program
A Learning objective (associated with the outcome)	The program manager is able to understand the benefits associated with the program and able to design the program
Knowledge related to the learning objective (associated metric)	Knowledge of applicable benefits management standards and processes (Scores in program management/ benefits management tests)
Skills factor/ (metrics)	How the generic benefits management standard is customized for the program, tailored to the scale of the program and company needs ? ( Review of benefits management artifacts for the program - including benefits profiles/ benefits register/ benefits management plan etc as applied to program environment)
Attitude/ (metrics)	How benefits management is applied in repeated programs? ( Feedbacks from functional/ portfolio managers of the program managers on how effectively outcome management and benefits realization were managed in a program )



These KSA charts can enable to lay out a roadmap for learning for different roles. Usually companies assess their weaknesses (and strengths) based on a maturity assessment such as P3M3 for project portfolio management and define the learning outcomes based on their specific requirements.

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