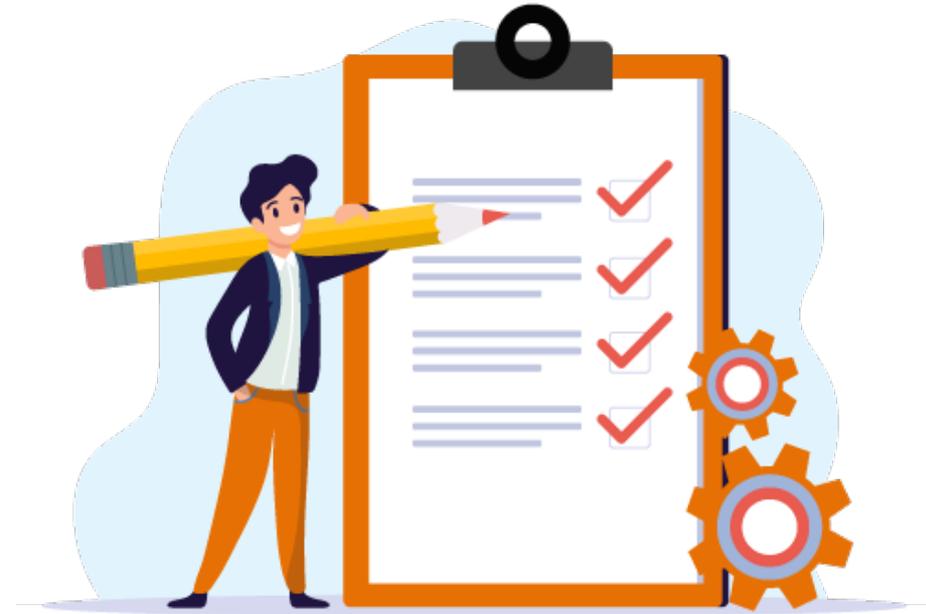


# CAREER HOUR

## Doing a Self- Assessment

Thursday 10<sup>th</sup> March



“Self-assessment is a process used for studying one’s own performance in order to improve it”

“The key role of self-assessment is to sustain self-growth through application of a personal development methodology”

“The goal is always personal development and improved performance.”



# Why Do Them?

To see where your strengths and weaknesses are

- Although doing this objectively can be difficult

To better target your development areas

- It requires that you think about the goals you want to achieve

To keep a record of your achievements

- You need to continue to update your assessment

To provide evidence for a promotion or pay rise

- Although your manager has to agree with your assessment

To see how you stack up against a standard

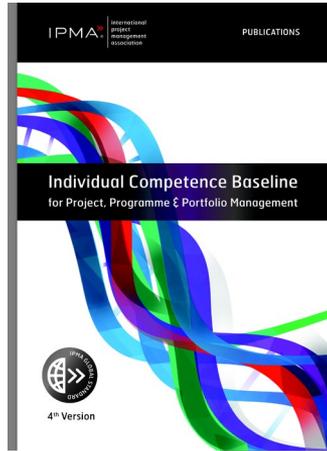
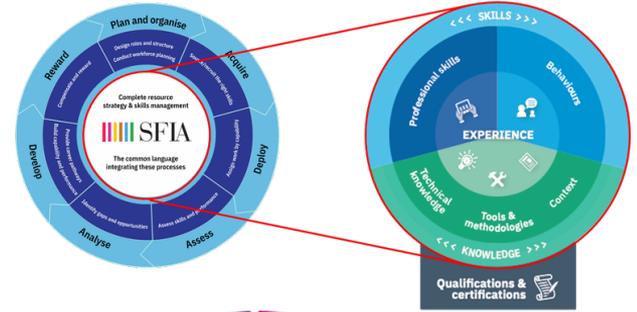
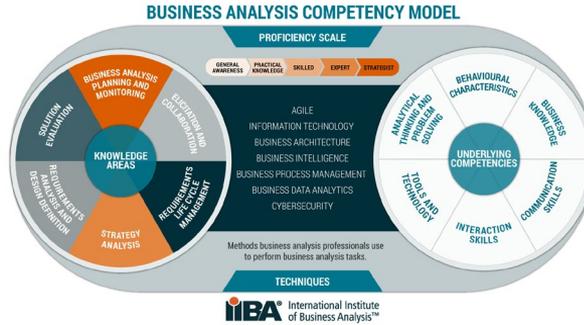
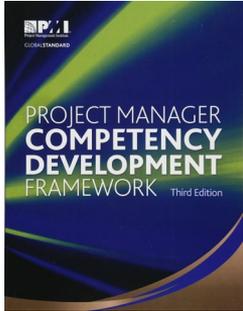
- You need to understand how and why you're doing that particular assessment

To play an active part in your career and your development

- Otherwise someone else makes those decisions for you

**A 'competency framework' is a structure that sets out and defines each individual competency required by individuals working in an organisation or part of that organisation.**

# What's Available to You?



# PMO Competency Framework



## 1 - P3M Administration

## 2 - PMO Management

(inclusive of PMO design, set up, run, transform and close)

# PMO Competency Domains

## 3 - P3M Delivery Support

## P3M Enabling

- 4 - Benefits and Value Management
- 5 - Business Case
- 6 - Change Control
- 7 - Change Management
- 8 - Financial Management
- 9 - Information Management
- 10 - Issue Management
- 11 - Knowledge Management
- 12 - Planning and Scheduling
- 13 - Quality Management
- 14 - Reporting, Insights and Analysis
- 15 - Resource Management
- 16 - Risk Management
- 17 - Stakeholder Engagement
- 18 - Supplier Management

- 19 - Assurance
- 20 - Capability Development
- 21 - Capacity Development
- 22 - Delivery Methods
- 23 - Governance Frameworks
- 24 - P3M Tools

# Knowledge, Skills, Behaviours

 <p>Applications and tools of the organisation (e.g. office systems, CRM/ERP systems, document management systems, P3M tools and HR systems)</p>	 <p>Change and Delivery methods and associated controls from conception to benefits realisation (e.g. MoP, MSP, PRINCE2, Managing Benefits, etc and local tailoring)</p>	 <p>Corporate processes and procedures (and associated timings) relevant to delivery (e.g. Administration, Finance, HR, Procurement, Quality Management System)</p>	 <p>Corporate metrics and measures (KPIs, OKRs, etc) and associated tools and techniques (e.g. benchmarking, Balanced Scorecard)</p>
 <p>Corporate vision, strategic aims and strategy and the industry &amp; market within which the organisation operates</p>	 <p>Corporate language and communication, culture (including politics), context and current priorities</p>	 <p>Content of the current portfolio and pipeline/backlog</p>	 <p>Boundaries of your authority and responsibilities</p>
 <p>Job descriptions, role descriptions and associated organisation specific competency frameworks</p>	 <p>Organisation, governance, assurance, and management theories (including strategy development)</p>	 <p>P3M and PMO theories and practice, including maturity models</p>	 <p>Professional standards and corporate norms (including appropriate delivery and legal frame-)</p>
 <p>The organisation's governance structure and who's who (along with customer and supplier organisations as appropriate) and relationships between the parties</p>	 <p>Skills, capabilities, and availability of people across the organisation that are involved in the delivery of the portfolio (and pipeline of change).</p>	 <p>Service management frameworks (e.g. ITIL)</p>	 <p>Who to contact for what (internally and externally)</p>



### Self

- Act Assertively
- Active Listening
- Ask Powerful Questions
- Balance Competing Needs
- Follow
- Reflect
- Professional Judgement
- Time Management



### Relationships

- Build Consensus
- Coach and Mentor
- Consult
- Customer Service
- Delegate
- Engage
- Empathise
- Empower
- Manage Conflict
- Motivate



### Thinking

- Decision Making
- Intuitive
- Interview
- Learn
- Systems Thinking



### Communications

- Communicate and Present
- Influence Others
- Inspire
- Innovate
- Persuade
- Think Creatively



### Analytical

- Analysis
- Benchmark
- Contingency Planning
- Critical Analysis
- Forecast
- Scenario Building
- Setting Objectives



### Problem Solving

- Data Assimilation
- Evaluate
- Feedback
- Monitor
- Negotiate
- Prioritise
- Research
- Reviewing
- Solve Problems



### Strategic

- Demonstrate business and commercial acumen
- Think Strategically



### Collaboration

- Collaborate
- Demonstrate
- Facilitate
- Network

 Applications and tools of the organisation eg. office systems, CRM, ERP, HR systems, document management systems, etc. eg. BIM, GIS, etc. tools and software	 Change and Delivery methods and associated operational considerations eg. Project management, etc. eg. BIM, GIS, etc. and socialisation	 Corporate processes and procedures eg. Administration, Finance, etc. eg. BIM, GIS, etc. eg. BIM, GIS, etc.	 Corporate metrics and performance eg. KPIs, etc. eg. BIM, GIS, etc. eg. BIM, GIS, etc.
 Governance, ethics, strategic aims and strategy eg. BIM, GIS, etc. eg. BIM, GIS, etc.	 Governance language and communication eg. BIM, GIS, etc. eg. BIM, GIS, etc.	 Context of the current portfolio and external market	 Boundaries of your autonomy and responsibility
 Job descriptions and responsibilities eg. BIM, GIS, etc. eg. BIM, GIS, etc.	 Organisational governance, structure and management eg. BIM, GIS, etc. eg. BIM, GIS, etc.	 Risk and BIM eg. BIM, GIS, etc. eg. BIM, GIS, etc.	 Professional aims and corporate goals eg. BIM, GIS, etc. eg. BIM, GIS, etc.
 The organisation's governance structure and roles eg. BIM, GIS, etc. eg. BIM, GIS, etc.	 Skills, capabilities, and experience eg. BIM, GIS, etc. eg. BIM, GIS, etc.	 Service management eg. BIM, GIS, etc. eg. BIM, GIS, etc.	 Why to contact by value (urgency and severity)

 <b>Self</b>	 <b>Relationships</b>
<ul style="list-style-type: none"> <li>- Act Assertively</li> <li>- Active Listening</li> <li>- Balance Competing Needs</li> <li>- Collaborate</li> <li>- Reflect</li> <li>- Professional Judgement</li> <li>- Time Management</li> </ul>	<ul style="list-style-type: none"> <li>- Build Consensus</li> <li>- Coach and Mentor</li> <li>- Consult</li> <li>- Customer Service</li> <li>- Delegate</li> <li>- Engage</li> <li>- Empower</li> <li>- Manage Conflict</li> <li>- Motivate</li> </ul>
 <b>Thinking</b>	 <b>Communications</b>
<ul style="list-style-type: none"> <li>- Decision Making</li> <li>- Inquire</li> <li>- Interview</li> <li>- Learn</li> <li>- Systems Thinking</li> </ul>	<ul style="list-style-type: none"> <li>- Communicate and Present</li> <li>- Influence Others</li> <li>- Inspire</li> <li>- Negotiate</li> <li>- Think Creatively</li> </ul>
 <b>Analytical</b>	 <b>Problem Solving</b>
<ul style="list-style-type: none"> <li>- Analyse</li> <li>- Benchmark</li> <li>- Contingency Planning</li> <li>- Critical Analysis</li> <li>- Forecast</li> <li>- Scenario Building</li> <li>- Setting Objectives</li> </ul>	<ul style="list-style-type: none"> <li>- Data Assimilation</li> <li>- Feedback</li> <li>- Negotiate</li> <li>- Prioritise</li> <li>- Research</li> <li>- Reviewing</li> <li>- Solve Problems</li> </ul>
 <b>Strategic</b>	 <b>Collaboration</b>
<ul style="list-style-type: none"> <li>- Demonstrate Business and Commercial Acumen</li> <li>- Think Strategically</li> </ul>	<ul style="list-style-type: none"> <li>- Collaborate</li> <li>- Demonstrate</li> <li>- Facilitate</li> <li>- Network</li> </ul>

	Pay attention to detail, but be pragmatic – keep the bigger picture in mind.		Provide candid feedback and recommendations in a constructive manner
	Take ownership of tasks and complete promptly, keeping customer up to date of progress and task completion		Remain objective, reserving judgement until all the information has been assimilated
	Act with discretion and integrity, maintaining an appropriate level of confidentiality		Be a team player, being a role model for the core values and behaviours of the organisation
	Be proactive and use initiative to achieve a successful outcome for all those involved in a timely manner		Be open and honest, take time to build relationships, credibility, and trust
	Be tenacious and act assertively as appropriate		Be open to challenge and debate; avoid being wedded to a single solution
	Be resilient and maintain a positive attitude		Work with passion and compassion, maintaining a growth mindset
	Probe and challenge confidently, in a professional manner		Recognise the limits of your expertise and continue to develop your knowledge and skills
	Be curious and look beyond the obvious; recognising non-verbal behaviours to get to the real picture		Practice what you preach and lead by example

# How to do a self-assessment

## Select

Choose to use a role profile as a starting point for your assessment or carry out the full assessment

## Reflect

Take time to reflect on your career to date, thinking about the difference experiences you have.

## Assess

Set aside quiet time to work through the assessment, the first time should take a couple of hours.

## Evidence

Gathering evidence to support your assessment is required, this is where most of your time for the assessment is taken up.



**PMO Analyst Self Assessment Form**

Name: \_\_\_\_\_ Date: \_\_\_\_\_

**1. My Skills**

Competency	Current	Target
Business Case		
Change Control		
Change Management		
Financial Management		
Information Management		
Issue Management		
Knowledge Management		
Planning and Scheduling		
Quality Management		
Reporting, Insights and Analysis		
Resource Management		
Risk Management		
Stakeholder Engagement		
Supplier Management		
Assurance		
Capability Development		
Capacity Development		
Delivery Methods		
Governance Frameworks		
P3M Tools		

**2. Key Competencies Required for the Project, Programme and Portfolio**

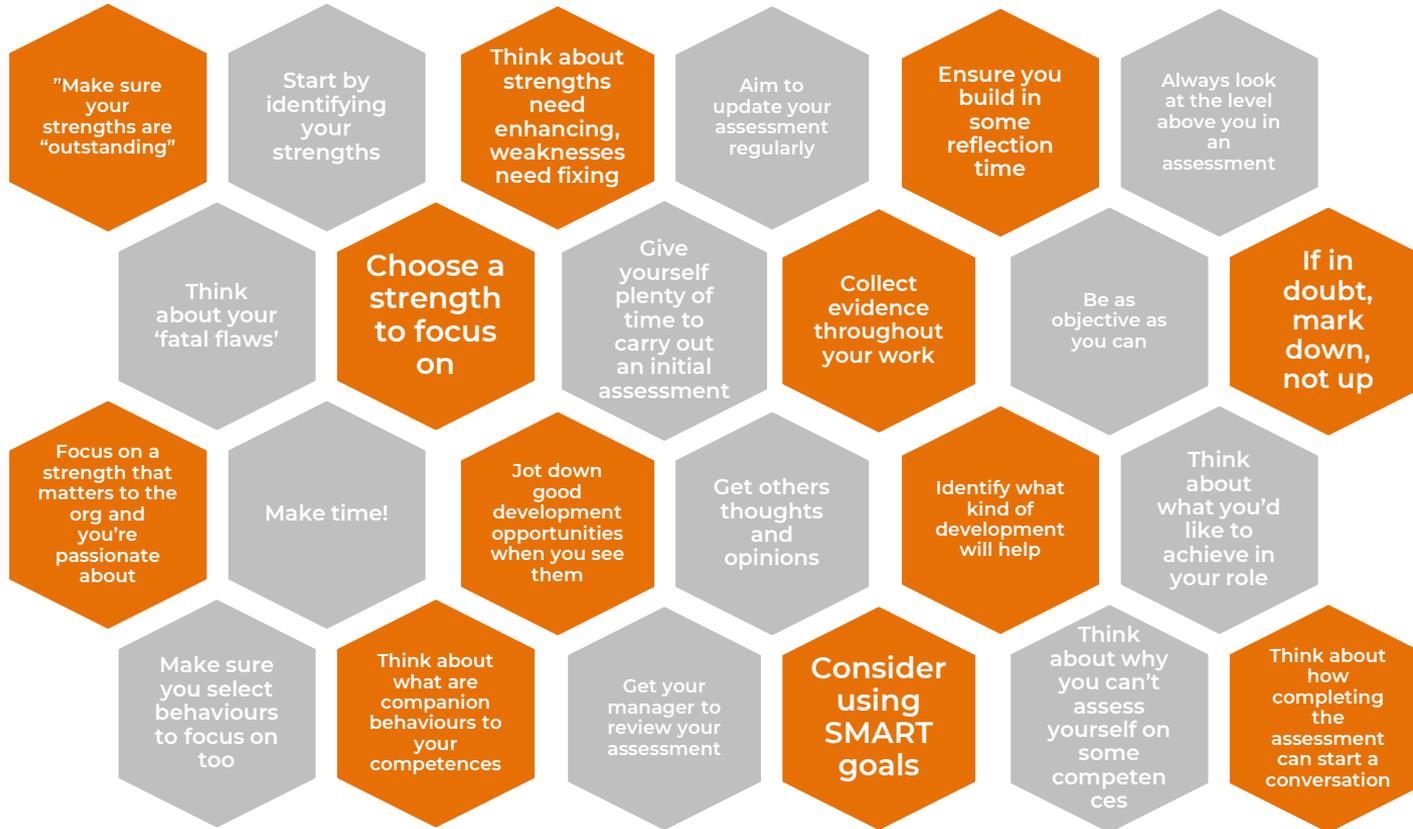
Competency	Current	Target	Evidence
Business Case			
Change Control			
Change Management			
Financial Management			
Information Management			
Issue Management			
Knowledge Management			
Planning and Scheduling			
Quality Management			
Reporting, Insights and Analysis			
Resource Management			
Risk Management			
Stakeholder Engagement			
Supplier Management			
Assurance			
Capability Development			
Capacity Development			
Delivery Methods			
Governance Frameworks			
P3M Tools			

**3. My Behaviors**

Behavior	Current	Target
Business Case		
Change Control		
Change Management		
Financial Management		
Information Management		
Issue Management		
Knowledge Management		
Planning and Scheduling		
Quality Management		
Reporting, Insights and Analysis		
Resource Management		
Risk Management		
Stakeholder Engagement		
Supplier Management		
Assurance		
Capability Development		
Capacity Development		
Delivery Methods		
Governance Frameworks		
P3M Tools		



# How to do a self-assessment



# Doing an online self-assessment

## Project

A temporary office set up to support the delivery of a specific change initiative being delivered as a project.

## Programme

A temporary office set up to support the delivery of a specific change initiative being delivered as a programme.

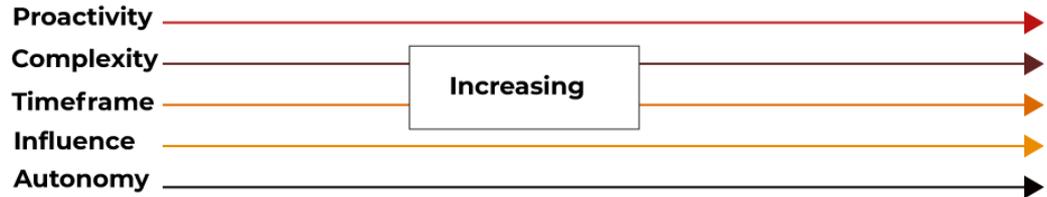
## Portfolio

Organisation Portfolio Office:  
A permanent office set up to support the definition and delivery of a portfolio of programmes and projects across an organization, division, department, geographical region or business unit.

## Centre of Excellence

A portfolio, programme and project management standards office, which defines standards (processes, templates and tools), skills and training, manages knowledge and may provide independent assurance

Foundation	Intermediate	Advanced	Expert
<p>Has basic knowledge of the activity and terminology.</p> <ul style="list-style-type: none"> <li>• Demonstrates this competency in familiar, day to day situations.</li> <li>• Follows established methodologies and codes of conduct</li> <li>• Works with guidance and seeks advice on non routine activities</li> <li>• Influences immediate colleagues in own team</li> </ul>	<p>Has broad knowledge of the activity and terminology and how it is applied in the current organisation.</p> <ul style="list-style-type: none"> <li>• Demonstrates this competency in new situations at an operational and tactical level.</li> <li>• Interprets guidelines and codes of conduct and applies them to all situations.</li> <li>• Works with little guidance, seeks review of outputs and approach to work as required.</li> <li>• Influences colleagues, customers, suppliers and partners on short term issues.</li> </ul>	<p>Has extensive knowledge of the competency and terminology and how it is applied in the current and other organisations.</p> <ul style="list-style-type: none"> <li>• Demonstrates this competency in complex and ambiguous situations.</li> <li>• Takes initiative in creating and managing own workload and that of others.</li> <li>• Advises others on the application of guidelines, code of conduct and methodologies.</li> <li>• Influences widely within the organisation at all levels on medium and long term issues.</li> </ul>	<p>Contributes to developing new knowledge and understanding of the activity.</p> <ul style="list-style-type: none"> <li>• Demonstrates this competency organisation-wide, focus is on future and strategy.</li> <li>• Sets direction and standards.</li> <li>• Accountable for the contribution and performance of others to the overall success of the organisation.</li> <li>• Influences externally, contributing to development of policy, standards and thought leadership.</li> </ul>



Proficiency levels are the degree of skill or expertise you have within a competence area

As your level of skills increase, so does your proficiency level

# Doing an online self-assessment



Foundation	Intermediate	Advanced	Expert
<ul style="list-style-type: none"> <li>Has basic knowledge of the activity and terminology</li> <li>Demonstrates this competency in terms of the standards</li> <li>Follows established methodologies and best practice</li> <li>Works with guidance and seeks advice on non-routine activities</li> <li>Influences immediate colleagues in own team</li> </ul>	<ul style="list-style-type: none"> <li>Has basic knowledge of the activity and terminology and is aware of the current regulations</li> <li>Contributes to this competency in own role and in an operational or tactical level</li> <li>Interprets guidelines and codes of conduct and applies them to all situations</li> <li>Works with little guidance, seeks advice on the application of guidelines and approach to work as required</li> <li>Influences colleagues, customers, suppliers and stakeholders on their terms issues</li> </ul>	<ul style="list-style-type: none"> <li>Has extensive knowledge of the activity and terminology and is aware of the current regulations</li> <li>Contributes to this competency in own role and in an operational or tactical level</li> <li>Interprets guidelines and codes of conduct and applies them to all situations</li> <li>Works with little guidance, seeks advice on the application of guidelines and approach to work as required</li> <li>Influences widely within the organisation and seeks on medium and long term issues</li> </ul>	<ul style="list-style-type: none"> <li>Contributes to developing new knowledge and understanding of the activity</li> <li>Contributes to the competency in own role and in an operational or tactical level</li> <li>Interprets guidelines and codes of conduct and applies them to all situations</li> <li>Works with little guidance, seeks advice on the application of guidelines and approach to work as required</li> <li>Influences widely within the organisation and seeks on medium and long term issues</li> </ul>



## Competence: P3M Delivery Support - Issue Management

CONTEXT	Foundation	Intermediate	Advanced	Expert
<b>Project Office</b>	<p>Follows instructions in the delivery of PMO services to the project</p> <p>Acts as the point of contact for project templates and documentation in relation to Issue Management</p> <p>Maintains project records and keeps logs up to date, specifically RAID log</p> <p>Applies updates, within the tailoring guidelines, to project artefacts as directed, specifically issue record template</p> <p>Responds to simple project queries (that require no processing, analysis or insights) e.g. number of open issues</p> <p>Contributes to QA activities within the project e.g. checks date that RAID log was last updated</p>	<p>Delivers PMO services to the project</p> <p>Inducts new project team members on issue management</p> <p>Validates and interprets project data, highlighting any non-conformance considers potential risks to project success identifies where incorrect RAG status has been assigned to an issue</p> <p>Considers instances of exception but seeks advice before formal escalation e.g. identifies where an issue has not been actioned</p> <p>Provides education and first line support on the application of project issue management frameworks, processes, procedures and tools</p> <p>Investigates anomalies or omissions in the application of project issue management frameworks, processes, procedures and tools and raises suggested areas for improvement e.g. issue resolution actions are missing from project plans</p> <p>Produces draft project updates and status reports e.g. aged issues report</p>	<p>Oversees the delivery of PMO services to the project</p> <p>Executes project processes on behalf of the project manager e.g. escalates issue to the appropriate governance body</p> <p>Provides advice and guidance on the tailoring of project issue management frameworks, processes, procedures and tools</p> <p>Facilitates project workshops e.g. issue resolution options</p> <p>Coaching and/or mentoring on project issue management frameworks, processes, procedures and tools</p> <p>Analyses and evaluates project data to identify discrepancies, trends, exceptions and opportunities e.g. sources of repeated issues</p> <p>Highlights learnings from the projects and recommends enhancements</p> <p>Scrutinises project decision making, applying challenge where required e.g. over taking the short term for issue resolution (dealing with symptoms not root cause)</p> <p>Recommends effective actions to mitigate project risks and exploit project opportunities e.g. recommends that an issue is dealt with at programme level not project level</p>	N/A

Performance Indicators:  
These are examples  
Not exhaustive

# Online View



## Gap Analysis

Export to 

Filter:

Include only Approved competency  Sort by competency group  Include employees with 0% compliance

Total gaps for all job profiles Current

FILTER INFO

### Total gaps for all job profiles

COMPETENCY	F	I	A	E	PEOPLE WITH GAPS	F	I	A	E
<b>Portfolio Context [PORTFOLIO]</b>									
PMO-01   P3M Administration [PORTFOLIO]					1	0	1	0	0
<b>PMO   P3M Delivery Support [PORTFOLIO]</b>									
PMO-03   P3M Delivery Support [PORTFOLIO]					1	0	1	0	0
PMO-04   Benefits and Value Management [PORTFOLIO]					1	0	1	0	0
PMO-06   Change Control [PORTFOLIO]					1	0	1	0	0
PMO-07   Change Management [PORTFOLIO]					1	0	1	0	0
PMO-08   Financial Management [PORTFOLIO]					1	0	1	0	0
PMO-09   Information Management [PORTFOLIO]					1	0	1	0	0
PMO-11   Knowledge Management [PORTFOLIO]					1	0	1	0	0
PMO-12   Planning and Scheduling [PORTFOLIO]					1	0	1	0	0
PMO-15   Resource Management [PORTFOLIO]					1	0	1	0	0
PMO-16   Risk Management [PORTFOLIO]					1	0	1	0	0
PMO-17   Stakeholder Engagement [PORTFOLIO]					1	0	1	0	0
<b>PMO   P3M Enabling [PORTFOLIO]</b>									
PMO-21   Capacity Management [PORTFOLIO]					1	0	1	0	0