

Case study

Client:	Financial sector: Large Bank
Area:	Project management Office- Infrastructure
Type of project:	Competency Assessment

Introduction

The PMO identified the need to conduct a competency assessment across the following role:

- Project Administrator
- Project Manager
- Programme Manager
- Project Demand Manager
- The purpose of the exercise was to establish a view of what competencies were reflected in the team and where developmental initiatives should be introduced.
- The additional benefits would be a more structured approach to testing skills in a recruitment capacity
- A group of resources were identified from the client to represent the panel that would contribute towards the following:
 - Design of the Competency Frameworks
 - Input into the Competency Tests
 - Voice of the larger group
- This team was made up of the following resources

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Business Challenge

- The Demand Project Manager was a newly created role and there was inconsistent views as to what the role entailed
- The entire team within the client was made up of primarily contract staff, with less than 25% of a permanent contingency
- The approach to dealing with assessing Contracting workforce was governed by the Labour houses, and it was necessary to be very sensitive to the third party involvement
- In parallel to the Competency Assessment project, other areas of the business were undergoing retrenchments, making progress slow and emotions high
- The client has a very specific project language, which was a modification of the Prince2 Methodology. All tests and frameworks had to be modified to accommodate this language.
- Project Panel were on various projects and work assignments, and their focus was not specifically on the assessment project
- No specific team values
- First project where the Assessment (Test) tool was utilised, challenges around set up; content and alignment to training initiatives

Bizmod Consulting involvement

Design of Competency Frameworks

- Evaluation of the Job Profiles with the subsequent design of the Competency Frameworks
- Workshop with various stakeholders in order to explore the relevance of the various competencies under the competency pillars
- Workshop with senior members to establish values for the team in line with the broader values and the divisional objectives
- Revisit the competencies regularly to ensure on going relevance throughout the project

Design and loading of 360 review assessment

- Set up the Competency Framework on the System
- Set up the pilot group on the system
- Conduct Testing exercises with the client representative
- Pilot roll out – end July 2013
- Roll out – scheduled as per client request - mid September 2013

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Design and loading of Assessment Tool

- Set up competency libraries, questions, and answers on the Survey tool
- Workshop with client to develop test questions and scenarios in line with clients requirements
- Create questionnaires per role
- QA
- Testing with subject matter expert
- Pilot roll out end July 2013
- Roll out Mid September 2013

One on one Interview

- Interview pre-selected candidates to verify finding from independent assessments
- Unpack underlying root causes
- Verify highlight challenges

Reporting

- Consolidation of findings from all assessments
- Roll up scores to reflect the following views
 - Individual view
 - Result per competency
 - Average per pillar
 - Rolled up average
 - Highlighted areas of strength
 - Highlighted areas of weakness
 - Job Discipline Scores
 - Rolled up average score per competency
 - Rolled up average score per pillar
 - Rolled up average score
 - Highlighted areas of strength
 - Highlighted areas of weakness
 - Consolidated Team Scores
 - Rolled up average score per competency
 - Rolled up average score per pillar
 - Rolled up average score
 - Highlighted areas of strength
 - Highlighted areas of weakness

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Outcome

- Bizmod had to learn to “wait” for client readiness, and be patient with slower paced organisations that require time to process interventions
- Project itself yielded some exceptional assessment questionnaires across the Programme; Project and Demand Manager roles as well as Project Administrator roles.
- Valuable input from the subject matter expert was obtained and this ensured that the assessment questionnaires were relevant and of a high standard and quality

Lessons learnt

- More time needs to be allocated to the design of the Assessment Tools (this is a time consuming process that requires the input from a SME from within the client organisation and cannot be done in isolation)
- The combination of the Assessment and the 360 degree review provides comprehensive insights to individual knowledge and application of knowledge, which is in turn evaluated against perceived personal output and customer perception
- Testing and Quality Assurance is critical and time must be made to ensure that the right test are developed so as to ensure relevance and validity of tests

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