



Creating an Effective Project Team Performance Assessment Process

An Online Continuing Education Course for Engineers

Course Number: BS-3033

Credit: 3 Hours / 3 PDH / 3 CPD

Creating an Effective Project Team Performance Assessment Process

Richard Grimes

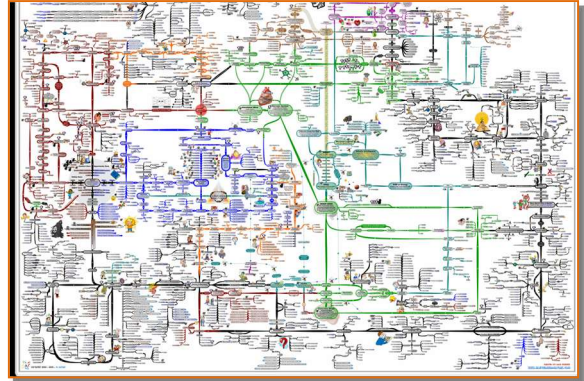


TABLE OF CONTENTS

THE PM’S PROBLEM	4
THE OPPORTUNITY FOR PROJECT PERFORMANCE IMPROVEMENT	5
COURSE LEARNING OBJECTIVES.....	6
THE IMPLICATION FOR USE BY OTHER PM PRACTITIONERS	7
THE FOUNDATION OF THE PROCESS	8
THE COMPONENTS OF MOTIVATION.....	9
SETTING EFFECTIVE PERFORMANCE GOALS	11
THE ELEMENTS OF EFFECTIVE PERFORMANCE GOALS	14
SECTION REVIEW	16
GOALS AND TASKS	18
ARE THESE SITUATIONS PRODUCTIVE OR BUSY?.....	18
ESTABLISHING EFFECTIVE PERFORMANCE GOALS.....	20
MEASURING “HARD SKILLS”	21
SECTION REVIEW	25
MEASURING “SOFT SKILLS”	26
SECTION REVIEW	29
EMPLOYEES RATING EACH OTHER: GOOD OR BAD IDEA?	29
PERFORMANCE ASSESSMENT SAMPLE USING A LIKERT SCALE	31
DEVELOPING AN ACTION PLAN.....	33
CONDUCTING THE GOAL-SETTING MEETING	34
PERFORMANCE OR ACTIVITY?.....	37
ELEMENTS OF AN EFFECTIVE PERFORMANCE ASSESSMENT PROCESS.....	38
#1 - YOUR JOB DESCRIPTION	38
#2 - WRITTEN PERFORMANCE STANDARDS	40
#3 - CONDUCTING A GOAL SETTING MEETING	41
DOCUMENTATION THAT SATISFIES THE “ORP”-PERSON	42
CONDUCT A PERFORMANCE ASSESSMENT MEETING.....	44
APPLYING THIS CONTENT TO A PROJECT ENVIRONMENT	46
PROJECT PLANNING STAGE	46
PROJECT TEAM PERFORMANCE IMPLEMENTATION.....	47

THE PM'S PROBLEM

Projects are typically matrix organizations consisting of team members temporarily brought together for the duration of the project. Although their department manager and, ultimately, the current project manager direct them locally at the project, they usually receive their annual performance assessments, wage increase, and promotion recommendations from their permanent manager back at company headquarters.



Unfortunately, the distant permanent manager has not seen them perform daily and the performance assessment is, at best, based on second-hand knowledge. The accuracy of this second-hand knowledge depends on whether local management on the project has the time and inclination to collect thorough documentation to forward to the permanent manager.

If the team member feels the information is not complete nor totally objective and accurate, this situation can easily become a source of poor morale and job satisfaction. Their subsequent work product is typically a direct reflection of whether they feel valued and treated fairly by the project.

This course will show you how to create a fair, objective, and accurate performance assessment process that will:

- Allow team members to self-monitor their work performance without having to wait to hear from their supervisor whether they are performing to expectations
- Provide permanent managers a dependable means of documenting performance assessments even though they may not have personally observed the employee perform
- Make team member performance linked to project outcomes and independent of whether their supervisors change through the duration of the project
- Improve project team morale and job satisfaction because they realize their good performance and that of low-performing teammates is measured objectively, fairly, regularly, and accurately.

THE OPPORTUNITY FOR PROJECT PERFORMANCE IMPROVEMENT

A performance assessment system that project team members viewed as objective, fair, and credible would go a long way to improving morale, job satisfaction, and, ultimately, work productivity and quality.

The system should also have these features to make it valuable to everyone involved including the team member, their department manager, the PM, and their permanent functional manager back at corporate headquarters:

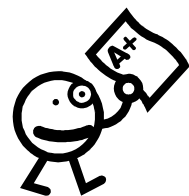
All project job functions must have an objective range of performance values. This is like the letter grades students receive in school: i.e., A, B, C, D, F

There must be ways for team members to get feedback on their performance without having to wait to hear it from their managers.

Again, this is the school example where students know how well they are doing in class by virtue of the test scores, homework, and class work grades they get back from the teacher during the semester. This allows students to self-manage their performance.

There should be periodic reviews of performance to allow team members to adjust performance accordingly to preset goals.

The report cards that students get throughout the year provide this periodic review. That way, they have time to improve performance as needed before year-end grades come out. Also, they do not have to wait until the end of the year to learn whether they passed that grade.



The system must be project-linked so if the PM or other local management changes, the scoring continues and employees can focus on existing project tasks and not have to waste time trying to adjust to new management.

In school, a substitute teacher had minimal impact on the students because the grading system was established and based on the course work, not based on personalities. This system also allows new managers just assigned to the project to know immediately who their performers really are without fear of being fooled by the false facades put up by those who do not have work standards as high as others.

These project scores go directly to the permanent functional manager for annual assessments and the team members are confident they are complete, objective, and accurate.

The students' grades, even those received while the substitute was present, still go to the "permanent" teacher for year-end scoring.

COURSE LEARNING OBJECTIVES

Course participants will learn:

1. The five components of motivation and ways to provide them to project team members
2. The typical causes of unnecessary personal stress on projects and how to reduce it
3. The four critical elements of effective employee performance goals
4. To change employee behavior from "busy" to "productive"
5. How to work with employees to establish effective performance goals
6. To discern between "hard" and "soft" project performance skills
7. To create a measurable range of "hard" and "soft" skills for use in documenting employee performance assessments
8. To create a method of collecting and reporting team member work performance objectively, consistently, and easily
9. To develop an effective performance action plan for use with project team members
10. How to plan and conduct an effective goal-setting meeting with employees
11. The two simple questions to ask an employee for the first goal setting meeting and the five simple questions to ask thereafter
12. The three elements of an effective performance assessment process
13. To consider the "ORPperson" and why you should care
14. How to apply all of this to a project environment

THE IMPLICATION FOR USE BY OTHER PM PRACTITIONERS

The PM can easily move this description of project tasks and their objective range of performance values (A, B, C, D, and F) to their next project ***because the major project job functions do not change.***



The Document Control people, the Safety group, the pipe fitters, welders, and discipline engineers will nearly always do the same things regardless of the nature of the project ***because their basic job functions do not change.*** (If they did change, they would be doing a new job and then we would come up with measurable descriptions of it, too!)

At the next project, a short training period with the PM's direct reports on how the system works can quickly implement it through the project as new team members join. Then the PM and department managers can expect to spend less time dealing with employee morale and job satisfaction issues and more time on project tasks.

The smart PM will try to keep the main elements of the project team together as they move from one project to the next because that will help the performance assessment process become easier and wider spread as their experience with it grows.

THE FOUNDATION OF THE PROCESS

The whole performance assessment process begins with learning how to identify *specifically* the performance we expect and establishing a range within it from “the least we will accept” (like getting a “C” in school) to “the most we could hope for” (like the “A” in school).

Once we have established performance ranges for all of the project functions, we can start scheduling periodic meetings to review progress, make corrections, or coach as needed. We can use the outcomes of the periodic meetings to create the performance assessment. We will use the terms “

The term “h... to function (sometimes... universally applied to ma... al” because they apply across n...



To view the remainder of the course material and to take the quiz for PDH credit, you must purchase the course.

Close this window and click “Add to cart” on the product page.

... that only ... ing a ... parts of a ... d applying ... and teamwork (if ... ing project) are equally as important but not just relevant to cabin... Everyone working on this project must share these same skills.

The soft skills for each position must be defined *as they relate to the specific position* if we want to establish a meaningful performance assessment process for anyone assigned to this project. Unless we define them as they specifically relate to a unique job, we will not be able to measure their performance accurately and we risk them being poorly motivated to do the best job possible.

Ultimately, their project productivity is directly related to their motivation.