ARCHITECTING PROJECT MANAGEMENT
for Enterprise Agility…
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What does it take to design and deliver an award winning unique, innovative program

Enabled workforce for Enterprise Agility
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ABSTRACT

This session will have discussion around the award winning Project Management Structured Effectiveness (PMStep) program.

PMStep was designed in-house with the objective of measuring and enhancing project management competencies of managers working across 30+ counties of HCL Technologies. This program has won several accolades including the coveted ASTD Excellence in practice citation, TISS Leapvault CLO Gold Award under best blended learning program in 2014, Brandon hall group gold award in Excellence in learning under Best certification program in 2015, Silver award in Best Innovative Learning and Development program in 2015.

The presentation will dive deeper into describing the business need, alternatives considered, final solution recommended, how the recommended solution was beneficial to various stakeholders including the customers, how the design is integrated with other people management practices, the need for collaboration among various stakeholders, the strategy adopted, the complete program design, success factors, governance structure, gamified learning, theatre based learning, how technology is leveraged, communication plans, problems faced, metrics identified, measurable benefits (both short term and long term), participants behavior changes, appreciation from leadership, lessons learnt, best practices and the future outlook.

This session will be hugely interesting for the participants to understand the best practices of an international award winning program and replicate the practice in their respective organizations.

INTRODUCTION

Project Management is one of the most critical roles in a Delivery Organization, a competency that managers use in their organizations to handle increasingly complex projects with higher success rates, lower uncertainty and costs. What sets a project manager apart is not only his ability to move beyond the “process” but to also effectively embrace the entrepreneurial aspects of project management.

At HCL, we were facing issues with the quality of project management, which was a threat to future business growth. As a training team, the onus was on us to design a solution which would address these issues, so that the project management effectiveness in the organization would increase. The solution, however, would need to be scalable and cost effective. After undertaking extensive research and debating on various alternatives, we zeroed in a customized internal certification which would be designed keeping in mind the organization’s need.

DETAILS OF THE PAPER

I. The need for Learning Intervention on Project Management:
A thorough analysis brought to the forefront the following challenges that we were facing:

1. **Customer dissatisfaction**: Annual customer satisfaction survey (CSAT) conducted by an external agency revealed that our customers were not satisfied with the performance of our project managers.

2. **Escalations during project delivery**: There were an increasing number of escalations from customers in various projects.

3. **Globally spread audience**: Our project managers were spread across 31 countries. Therefore, the required learning solution had to ensure accessibility at all regions.

4. **Need for a scalable, customizable solution and cost-effective solution**: With a large number of project managers to be covered, each having unique learning needs, we needed to ensure scalability and customization.

**II. Proposed solutions:**

Once the need for the training was identified, the Technical Training Team at HCL went on to identify solutions to address this. The final solution chosen would need to address all the challenges in the most cost effective manner.

1. **Encouraging employees to become PMP certified managers**
   
   The first option was to sponsor employees to pursue the external PMP (Project Management Professional) certification. However, this was not selected since
   
   a. It would not address business specific pain-points.
   b. It could not be customized to individual learning needs
   c. It was not cost-effective, considering the large number of project managers we had to cover.

2. **Roll out a standard certification program internally**
   
   The other alternative which was considered was to provide a standard program for all project managers across the organization. However, this option was not selected due to the following reasons:
   
   - Diverse needs of customers across the organization was not met
   - Standard program does not address the competency gap of each individual project manager

3. **A focused learning program with customizable content**

   The third option considered was to identify the competency gaps and provide a customized learning solution for each individual project manager. The learning solution would enable project managers to sharpen their skills, develop their competencies, interact with other Project Managers and apply the learning within their project.

   Since this solution ensured customization, scalability and sustainability, this option was finalized.

**III. Project Management Structured Effectiveness Program (PMStEP)- The solution**

PMStEP was thus devised exclusively for project managers, with the objective of enhancing project management competencies across the organization. The program enables project managers to concentrate on their focus areas, identified in their diagnostic report, enhance learning in those areas to sharpen their project management skills and apply it in their current project. PMStEP moved beyond the conventional aspects of project management, and included the behavioural aspects required in a project manager.
PMStEP was designed in a way that it addressed all the challenges that were identified earlier.

1. **Addressed individual competency gaps through customization** – Participants can select the focus areas identified in their diagnostic report and choose courses they want to undertake depending on the focus areas identified for them.

2. **Improving customer satisfaction by alignment to customer feedback** - Customer remarks on various project management parameters during the customer satisfaction survey have been mapped under 8 diagnostic driver categories. PMStEP provides customized learning solutions on these driver categories, enabling managers to address the areas of concern and address customer needs better. This improves the overall Customer Experience Index for the organization which gets reflected in the CSAT score. This in turn, enables customer retention and business growth.

3. **Achieving cost-effectiveness through internally developed solutions** - By reducing dependence on external certifications, this practice helps us achieve our desired objectives with minimal investment, thereby, proving to be cost-effective.

4. **Accessible across 31 countries by leveraging technology** - PMStEP is a self-paced learning program, available for project managers across 31 countries, on the organization’s Learning Management System.

An identified solution will not be effective unless it is aligned to the organization’s goal. Thus, PMStEP was developed keeping in mind our company goals:

1. **Focus on employee development** - PMStEP not only helps the learners develop and benefit from the program, but also helps them apply the knowledge gained through learning in their current projects, share the knowledge gained in the form of best practices, and provides an opportunity to interact with senior leaders through webinars and continuously improve themselves.

2. **Create robust, flexible and structured processes** - This practice has helped us to significantly reduce turn-around time for training requests and meet critical customer requirements on time, with the help of virtual learning platform. This has also reduced effort and resource consumption.

3. **Building a competent global workforce** - This practice makes learning accessible across 31 countries and enhances project management competencies of a global workforce by addressing their diverse needs.

**IV. PMStEP Program Design:**

1. **Strategy:**

A 4-point strategy was designed initially to ensure that this practice is a well-structured end-to-end approach. The strategy designed was as follows:

a) Measurement of project management effectiveness through diagnostic survey

b) Analysis of competency gaps and generation of customized individual diagnostic report

c) Enhancement of project management competencies through customized learning

d) Enablement of continuous learning
2. Structure:

Pre-Diagnostic:
Keeping in mind the need for measurement and analysis of competency gaps before proceeding to train employees, we introduced Project Manager Effectiveness Diagnostic (PMED), as a precursor for PMStEP. PMED is a web based diagnostic survey which helps identify and analyse the drivers of project manager’s effectiveness. It was administered in the form of a simple and user-friendly web-based survey covering four employee populations:

a) Project Managers
b) Reporting managers of project managers
c) Head of PMO / Operations
d) Project Sponsors
PMED helps us generate customized reports for each participant, which identifies opportunities for improvement and benchmarks their capabilities with peers from the industry and the organization. The report paves the path for understanding which are the competencies in project management, the employee should focus on.

Individual Development Plan:
The next step was for the employee to create his/ her own Individual Development Plan (IDP) which specified

a) the skills to be worked on
b) the resources that employee plans to utilize for learning
c) The milestones for learning and implementation at work
d) The timelines/ target date of completion

Learning and Application:
The actual program, in itself consisted of three phases: *(Ref: Image 1 and 2)*

a) Learning phase – Participants need to undergo learning in the selected focus areas by accessing the resources on LMS and those from external vendors.

b) Critical incident/Application phase – “Critical Incident” is an opportunity given to the participants to demonstrate their learning in a particular focus area by implementing it in their current project and area of work. In the critical incident, the participant needs to write down how he/she implemented the learning in their project, which would further be reviewed by the Reporting Manager.

c) Review Phase – Reviews are set of assessment questions that will be rated by the Reporting Manager on a rating scale of 1 to 5 and scored accordingly, thereby assigning the required number of credits. There are two reviews that need to be completed. The two reviews are under Milestone II and Milestone III.
3. Training Methodology and Content Design:
The success of a program depends on understanding the audience and tailoring the content and mode of training to suit them. In this case, depending completely on classroom sessions would not help the cause of reaching out to employees globally. On the other hand, only e-learning would not be as effective in improving competencies. Hence we devised a customised blended learning approach which involved the following:

a. **Learning Management System**: Our 24x7 online learning management system facilitates anytime, anyplace, any pace learning. The LMS, with over 8500+ courses, was leveraged to facilitate a smooth e-learning process for the employees.

b. **In-house content development**: A panel of SMEs (Subject Matter Experts) was identified with the objective of developing learning resources for each of the focus areas identified in diagnostic survey and mapping the resources to the respective focus areas.

c. **Experiential Learning through Simulation workshops**: A project management Simulation Workshop simulates a project environment through interesting hands-on activities thereby bringing out the significance and dynamics of the driver categories that has a role to play in Project Manager's effectiveness.

d. **Social Learning**: Our organization has an internal social networking platform, where employees can connect with each other, share updates, documents, files, create events and join groups of interest. An exclusive PMSiEP Community has been created on this platform, to encourage the participants to interact and learn by sharing.

e. **Gamified learning**: Learning was not just restricted to the courses and assessments. We incorporated gamification in the learning process. Games like quiz, crossword puzzles, word hunts/word maze were conducted, each focusing on one of the seven performance driver categories for project managers. *(Ref: Image 3)*

f. **Case study discussions through TelePresence**: Participants, spread across locations, are divided into groups and required to discuss case studies and make presentations. The group activities in these
sessions, involving participants from different countries, are made possible using TelePresence technology. (Ref: Image 4)

Image 3: Gamified Learning for PMSiEP  
Image 4: A Telepresence session in progress

g. **Workplace Learning through Critical Incidents**: Participants of PMSiEP were required to report critical incidents during the program, citing instances where they applied the learning in their respective projects. These critical incidents were evaluated by their respective managers and the feedback shared with the training team.

h. **Online Discussion Forums**: Discussion Forums are online webinar sessions held at varying times to suit employees at multiple time zones. These are Instructor Led sessions, where employees learn by interacting with each other.

i. **Theatre-based Learning**: Learning is also delivered through theatre-based workshops. In these workshops, Project managers are divided into groups and asked to execute a project which was to choreograph a dance performance. The lessons and insights from these activities and their applicability to real-life work scenarios are shared with the project managers during the workshop. (Ref: Image 5)

j. **Leaders Talk**: Participants got multiple opportunities to listen to talks from Leaders, either through Live sessions or through recorded webinars of the sessions, including a batch commencement session. These sessions proved to be an immense learning experience as well as a motivation for participants. (Ref: Image 6)
k. **Knowledge sharing platforms:** Our internally developed knowledge management portal built on Sharepoint platform allows networking and interaction among PMSiEP participants, peers, trainers and subject matter experts. The portal also allows participants to blog, share best practices, upload and share learning resources.

4. **Learning experience:**

While designing a learning solution, it is imperative to ensure it is user friendly. A smooth learning experience, not only aids the participants in learning, it also creates a positive image in the minds of the user, hence ensuring a higher on-boarding rate to the program, positive word of mouth publicity, and a higher success of program completion.

We took the following steps to ensure a user-friendly learning experience:

a. **Implementation of Project**

To ensure the program was implemented hassle-free, we had a detailed risk mitigation plan, *(Ref: Image 7)*, project-plan, *(Ref: Image 8)* etc. in place.

<table>
<thead>
<tr>
<th>No.</th>
<th>Key</th>
<th>Mitigation Plan</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Top management support for the program due to inroads in better learning (achieved)</td>
<td>DFIT Panel learning approach which facilitates flexible learning for participants</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Participant being proactive in terms of role for the new environment</td>
<td>All PMiB learning sessions are through virtual mode conducted in 2-4 weeks; on-time</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Effectiveness of program being attentive to peer program design</td>
<td>Diagnosis responses program design leading to behaviors of students</td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Effectiveness of program being attentive to peer program design</td>
<td>Validation of Program design by PMI, a learning leader, ensuring that participants are being consistently motivated to terms of the provided program design</td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>Participant PM and level manager are properly trained for the responsibility to lay words for the program</td>
<td>Participants PM and level manager are properly trained for the responsibility to lay words for the program design</td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>Balancing of learning by participants</td>
<td>Early Participant will have a SPICE tool to keep track, understand the challenge and facilitate their progress</td>
<td></td>
</tr>
<tr>
<td>7</td>
<td>Balancing of learning by participants</td>
<td>Learning, best practices, Task knowledge received, peer participation to solve the program</td>
<td></td>
</tr>
<tr>
<td>8</td>
<td>A robust Governance structure</td>
<td>A core team was formed which designed, implemented and continuously tracked and monitored the progress of participants and worked on implementing feedback as required.</td>
<td></td>
</tr>
</tbody>
</table>

*b. PMStEP Web application:* A web application was designed internally, to serve as a dashboard, and aid the participants and reporting managers in tracking the progress of participants. *(Ref: Image 9)*

![Image 7: Screenshot of Risk Mitigation Plan](image7.png)

![Image 8: Screenshot of Project Plan](image8.png)

![Image 9: A screenshot of PMSiEP web application](image9.png)

c. **A robust Governance structure:** A core team was formed which designed, implemented and continuously tracked and monitored the progress of participants and worked on implementing feedback as required.
and when applicable. The team also worked on periodic report generation which was shared with the Senior Management for their inputs. (Ref: Image 10)

![Image 10: Governance structure & stakeholders](image10)

d. **Sample Templates**: To ensure a smoother learning experience for participants, Sample templates of IDP’s, (Ref: Image 11), time involvement required from RM’s (Ref: Image 12) and Participants, etc., was shared with the participants and RMs.

![Image 11: Sample IDP template](image11)

![Image 12: Time investment by Reporting Manager](image12)

e. **Regular communication**: We worked on an exhaustive communication plan which ensured that participants would get regular updates, and reminders on the program. An exclusive communication email group and ID was set up for focused communication and to ensure that the participants would not miss out any important update.

f. **24*7 Helpdesk**: A dedicated team was formed to provide continuous support to the participants. The helpdesk was bound by a SLA to respond to any query within 24 hours.
g. **PMStEP Champions:** The top performers in the program were identified and invited as PMStEP Champions, to interact with the other PMStEP participants in order to motivate them, share knowledge and experiences and address their queries. To recognize their efforts, a logo was designed, which they could use in their signatures. *(Ref: Image 13)*

![](Image 13: PMStEP Champion logo)

h. **Geo focus:** The participants of this program were spread across several countries. Dedicated sessions were planned and conducted for various Geo locations, keeping their respective local timings in mind. This ensured hassle-free participation for all participants across locations.

i. **Location-wise SPOC support:** The training team identified location-wise SPOCs (Single Point of Contacts), who arranged face-to-face meetings with the participants to address their concerns and challenges faced. Wherever SPOCs couldn't be mapped in a location, support was extended through calls, helpdesk, e-mails, and chat sessions.

j. **Post Certification learning:** To live up to our motto of continuous learning, we conduct a PMStEP Retreat for certified participants, to encourage the participants to continue their learning. The Retreat provides them an opportunity to network with peers and senior leaders and learn through interaction and business simulation and fun filled learning programs.

5. **Collaboration with other stakeholders**

The success of a solution of this enormity could not rest completely on the shoulders of the training team. We collaborated with various other people practice teams within HCL and used their tools to achieve the end result.

a. **Learning Management System** leveraged for online learning

b. **Knowledge Management portal** provided a platform for networking and interaction among PMStEP participants, trainers and subject matter experts.

c. **Online Coaching sessions** were implemented for PMStEP participants, which were carried out through online meeting tools and conference calls. Further, these coaching sessions are also recorded, packaged and made available on our learning management system for others to access.

d. **An Online community of practice** was launched, which was a platform for employees to share their thoughts in the discussion threads and chat rooms classified according to the technical knowledge areas.

e. **Leaders Teach,** the internal platform to identify, evaluate, certify and utilize internal trainers and subject matter experts internally, was leveraged to identify SMEs in the area of Project Management.

f. **The Social networking platform,** was leveraged to help employees connect with each other, share updates, documents, files, create events and join groups of interest.

g. **The Workforce Planning Cell** helped us in identifying the participants and also in analysing how many Project Managers were mobilized internally to meet open positions rather than going for external hiring.
h. **Good Practices Conference**, an annual conference conducted for employees to share best practices and lessons learnt, proved to be a repository of learning resources for the participants.

V. **Program Evaluation**:

Our team implemented a 5-step evaluation mechanism to measure the results at various stages of the practice.

1. **Satisfaction**:
   a. Did the learners find the program useful?
   b. Are they satisfied with the learning experience?
   *Evaluation Mechanism:* Regular feedback from participants

2. **Learning**:
   a. Did the participant learn what was intended?
   b. Has the knowledge level of the participant increased?
   *Evaluation mechanism:* The Critical Incident and Reviews by RMs

3. **Adoption**:
   a. Did it reach the desired audience?
   b. Did they complete or comply as desired? If not, why?
   c. Was there a buy in from the Senior Management?
   d. Will learners recommend this program to their peers?
   *Evaluation Mechanism:* Fortnightly Reporting to Senior Management; Bi-monthly calls with Senior Management and Participants; Testimonials from participants and Senior Management; Quarterly Usage Analysis of LMS to understand the trend in participants taking up the learning resources

4. **Efficiency**:
   a. Was it cost effective?
   b. Were resources like time optimally used?
   *Evaluation Mechanism:* Cost incurred V/s Cost of existing Certifications; Time & effort by employees spent in PMStEP v/s Time and effort for External Certifications

5. **Attainment**:
   a. Has it met the objectives? Are customers satisfied?
   b. Has there been a performance improvement in the participants post the program?
   c. Have there been significant benefits to the organization?
   *Evaluation Mechanism:* Organizational level customer satisfaction surveys; Post PMED; Analysis by Workforce Planning Cell to understand how many Project Managers were mobilized internally to meet open positions rather than opting for external hiring.

VI. **Results**

**Short-Term Business Impact**

1. **500+ PMStEP certified managers** – 500+ managers have been PMStEP certified so far. The practice helped us fulfil the need to address identified competency gaps in project managers, through a program that is accessible across 31 countries.
2. **Timely project delivery** – There was 20% increase in project delivery on time and within budget

3. **Improved customer satisfaction** – There was 4.5% YoY increase in organization’s overall customer satisfaction score on the parameter of Project Management and 10% YoY increase for the same parameter for premium accounts of our organization.

4. **Increase in billing hours** – There was 25% YoY increase in billing hours of the participating project managers.

5. **Increase in number of projects managed** – 28% of the participating project managers managed more projects after completing the certification.

6. **Impact on performance** – 28% of the participating project managers were promoted in the subsequent appraisal cycle after the completion of the program.

7. **Cost Saving** - Cost saving of $350000 through reduced dependence on external certification

8. **Increased utilization of learning resources** – The following metrics show the utilization of some of the external learning resources made available to PMStEP participants:
   a) No. of best research downloads - 29500+ downloads
   b) No. of tools & implementation resources accessed – 21900+
   c) Number of participants in webinars – 1000+

9. **Increased employee-driven learning** – Over 700 Individual Development Plans (IDPs) have been submitted by PMStEP participants

10. **Application of learning on the job** – Over 1500 Critical Incidents were submitted by participating project managers and approved by reporting managers.

11. **Improved Post-Certification diagnostic scores** - The post certification project manager’s effectiveness survey that was conducted a couple of months after the certification was complete, revealed higher scores for participants. There was an average of 32% increase in scores across the organization.

12. **Participation in knowledge sharing forums** - 60+ PMStEP live sessions, on various project managers’ effectiveness driver categories were conducted covering 700+ participants in India & Geo locations.

**Long-Term Business Impact**

1. Enhancement of project management competencies across the organization
2. Effective deployment of existing workforce by WPC (Workforce Planning Cell)
3. Project Management Certifications mandated as one of the major criteria for promotion in Performance Appraisal
4. Increase in best practices sharing across the organization
5. Effective use of social media as discussion forums for continuous learning
6. Value addition to the organization by moving beyond project management knowledge areas.
7. Projected cost-savings of $2 million in the next 5 years

**Participant Behaviour**

1. Increased contribution towards knowledge sharing
2. Increased participation by onsite employees
3. Participant satisfaction as reflected in testimonials
VII. Good practices and Lessons Learnt

1. **Collaboration brings efficiency, scalability and sustainability** - We had to come up with a solution that could address the needs of 5000+ employees. Such an enormous task could not have been carried out by the central training team in isolation. Therefore, we collaborated with several stakeholders including senior leadership, delivery units, employees, external vendors and other enabling functions to design, develop and implement this program. The scalability achieved along with reduced costs can be sustained over a period of time through effective collaboration among stakeholders.

2. **Training team should be a consulting body** - One of the most important lessons to be understood is that the training team can no longer remain a back-end service provider. The training team needs to evolve as a consulting body and play a proactive role in identifying and solving the challenges faced by customer-facing delivery teams.

3. **Technology and social media ensure sustainability** - Leveraging technology and social media platforms will help to sustain any learning intervention in the long-run. Social learning should be leveraged effectively.

4. **Top performers can champion learning** - It was a challenge to keep the participants motivated all throughout the program. To address this, PMStEP Champions, who were active or already certified participants, were identified. These champions motivated participants in their units.

5. **Endorsement from business is important** - Detailed discussions with the Senior Leaders about the programs were held, who then went on to endorse the program. Their endorsements were used in a campaign through various channels to create visibility and encourage participation.

6. **Regular communication and recognition sustain momentum** - Regular updates were shared with leaders, managers and program participants on the progress. To give recognition, customized mailers were sent to the first 50 certified participants marking their Business Unit heads in loop. This set the stage for more participation.

7. **There has to be fun in learning** – One of the ways to keep the participants engaged in the program is to build-in fun and excitement. This can be achieved using innovative learning methodologies like gamification, contests, theatre-based learning, humorous newsletters and interaction on social platforms.

**CONCLUSION**

In our organization with a global presence and customers around the globe, Project Management is one of the most critical roles to ensure timely and quality delivery. Hence PMStEP was required to help in addressing the specific needs which were identified. PMStEP provided customised learning to employees, instead of a standard program, hence ensuring higher effectiveness.

With over 500 managers having been certified so far and a 4.5% YoY increase in organization’s overall customer satisfaction score on the parameter of Project Management, $350000 of cost savings, the program has been a huge success.
The program has also won awards on various international platforms including ASTD Citation, TISS Leapvault, CLO Learning awards, and Brandon Hall awards, further proving the effectiveness of the learning solution that was designed.

REFERENCES