ANALYSIS OF:

MANAGEMENT TEAM DEVELOPMENT NEEDS ASSESSMENT

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EXECUTIVE SUMMARY

This report documents a collaborative effort between the Information Technology Division and OrgWide Services, LLC for the purpose of exploring the training and professional development needs of current and future managers in the IT division.

A customized management competency assessment was designed and administered to four distinct teams identified as: (1) Executive Management, (2) Senior Management, (3) Front-line Management (**the target audience**), and (4) Front-line Team Members. A total of 300 respondents participated in the survey.

Scores from respondents in each of the four cohorts above were averaged and compared to the other cohorts' averaged responses for 50 items reflecting six important management competencies. As expected, there can be found a number of discrepancies in how each responding cohort views the target front-line management team across the competencies.

In general, the Front-line Management team rated themselves higher across most items than did members in the other cohorts. A very positive finding was that the Front-line Team members *also* rated the managers relatively positively across all of the management competencies. On the whole, the Executive Management team rated the Front-line managers the lowest when compared to the other cohorts.

The average score of responses *of each cohort* to items within each of the six competencies may suggest training opportunities for the target audience, the Front-line Management team. A careful comparison of *each cohort's average score to other cohorts' average scores* reveals a significant discrepancy in how the Front-line Management team's skill set is perceived by different levels of the organization.

Verbatim comments provided by the respondents have been included at the end of this report, and when combined with the quantitative results of this analysis, can be very instructive about perceptions of the Front-line Management team's training opportunities.

A note about the statistics reported in this assessment: Numerical values of 1, 2, and 3 were assigned to the categorical scale ratings of *Low*, *Acceptable*, and *Strength*. Consequently, it would be reasonable to interpret an average (mean) score of 2—across all of the respondents for a single item—as an "acceptable" score. Statistically speaking, however, it is difficult to differentiate between a 1.8, 1.9, 2.0, 2.1, and a 2.2 because of the measurement error inherent in the scales themselves. That is, it is impossible to say that an average score of 1.8 is different than a score of 2.0 (which is considered an "acceptable" score). In statistical parlance, "there is not a statistically significant difference between a score of 1.8 (or 1.9) and a 2.0." However, there *is* a difference—both statistical and meaningful—between a 1.7 and a 2.0. The reader will note that scores of 1.7 and below have been called out in the tables in red text as being less than "acceptable" scores.

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INTRODUCTION

In August of 2007, a collaboration began between the vice president of IT Marketing and Communications and OrgWide Services, LLC for the purpose of designing and developing a customized management competency assessment template that would be administered using a multi-level sampling frame. The purpose of these assessments was to gain the perceived knowledge and performance gaps in the targeted management team (i.e. Front-Line Management) and result in a recommended management curriculum.

Four assessments were administered to each of the four cohorts. The first assessment was developed for the executive management team. This cohort had the option of taking the assessment online or in an interview setting by an OrgWide team member. The second assessment was administered to the senior management as an online assessment. The third assessment was administered to the front-line management, the true targeted population of the assessment. Finally, the assessment was administered to the front-line team members who responded on the front-line management teams' performance. Each cohort was asked to assess the average MANAGER'S ABILITY, and IMPORTANCE of a set of competencies considered important to leadership and management functions.

Development Needs Assessment

Development needs assessment (DNA) has become an important tool for helping an organization focus shrinking human resource training dollars. DNAs can reveal a number of issues. For example: How important do the managers/employees believe certain skills to be? How often to managers/employees think they engage in certain skills on the job? What is the perceived current level of managers'/employees' skill or ability across important training dimensions?

While this assessment initially sounds similar to a traditional 360º-type assessment, it differs significantly in how the questions were designed, administered, and analyzed. The only true similarity to a 360º-type assessment is that our sampling frame will include executive managers, senior managers, front-line managers, and front-line team members.

Survey Development

One set of items was used across each of the four cohorts. Items regarding manager (i.e., Front-line Manager) training needs were designed. OrgWide provided the IT representative with 63 different items that tapped leadership and management characteristics of importance to IT across seven dimensions. After a meeting between OrgWide and IT, fifty items were chosen across six dimensions to be on the final assessment. **Table 1** below contains the 50 items that were developed for the development needs assessment.

Table 1: *Development Needs Assessment Items*

DIMENSION	ITEM
LEADING	1. Builds and sustains enthusiasm
	2. Builds and sustains trust
	3. Demonstrates respect and concern for others
	4. Demonstrates adaptability and flexibility
	5. Demonstrates courage in making decisions
	6. Displays integrity
	7. Seeks and accepts responsibility
	8. Encourages innovation and breakthroughs
	9. Establishes performance standards
COMMUNICATING	10. Conducts effective meetings
	11. Maintains effective team member relations
	12. Maintains effective cross-team relations
	13. Conducts effective presentations
	14. Provides effective written communication
	15. Provides effective verbal communication
	16. Utilizes active listening skills
	17. Provides constructive feedback
	18. Communicates business drivers for IT initiatives
PLANNING & FORECASTING	19. Utilizes appropriate analytical tools and methods
	20. Develops and maintains budgets
	21. Develops and maintains contingency plans
	22. Develops long-term plans
	23. Develops tactical plans
	24. Establishes priorities and timelines
	25. Clearly defines performance expectations
DIRECTING & COORDINATING	26. Assigns responsibilities and accountability
	27. Uses sound reasoning and judgment
	28. Uses appropriate decision-making techniques
	29. Maintains effective internal customer relations
	30. Encourages teamwork and team-building
	31. Maintains effective vendor relations
	32. Monitors and ensures vendor productivity
STAFFING & DEVELOPMENT	33. Confronts and resolves grievances and conflicts
	34. Encourages and supports team member development
	35. Recognizes and rewards superior performance
	36. Utilizes appropriate hiring processes
	37. Uses delegation appropriately and effectively
	38. Identifies and mentors “high-potential” team members
	39. Demonstrates coaching skills
	40. Demonstrates mentoring skills
	41. Utilizes appropriate team member promotion processes
PROCESSES & RESULTS	42. Analyzes and acts on customer feedback
	43. Analyzes and improves products or service quality
	44. Ensures corporate policy compliance
	45. Holds self and others accountable for quality
	46. Understands and creates customer value
	47. Uses benchmarking and “best practices” methodologies
	48. Maintains effective and efficient work processes
	49. Utilizes effective time management techniques
	50. Effectively uses OnQ Project Methodology

Scale Development

In addition to wanting to capture perceptions of each level of managements' ABILITY for the dimensions of interest, it was important to ascertain if different levels of management perceived differently the level of IMPORTANCE of behaviors associated with those dimensions. To collect that information, each respondent was asked to characterize the average MANAGER'S ABILITY, as well as rate the IMPORTANCE of each competency. Different scales with different semantic anchors were required to prompt respondents appropriately. **Table 2** below depicts the different three-point scales used for the assessment.

Table 2: Survey Scales

VARIABLE	SCALE
"AVERAGE ABILITY"	*Strength*
	Acceptable
	Low
"IMPORTANCE"	*Essential*
	Important
	Somewhat Important

Survey Administration

The survey was administered online except for members from the executive management team who chose to participate in a face-to-face interview. The survey was launched on October 16th for the executive management and senior management cohorts and on October 17th for the front-line management team and front-line team members. The survey closed on Friday, October 26, 2007.

Table 3 reflects the number of respondents from each cohort that participated in the assessment.

Table 3: Number of respondents

COHORT	NO. of Respondents
Executive Mgmt.	14
Senior Mgmt.	39
Front-Line Mgmt.	101
Front-Line Team	146
Total	*300*

Survey Analysis

There were seven team members from executive management that chose to complete the survey through the interview process. The results from the interviews were entered into a database with the online results. Comments from these seven team members are available at the end of this report.

The database was analyzed using a research computerized statistical analysis package (*SPSS V.15.0*, SPSS, Inc., Chicago, IL). Results of the analyses were developed into the various tables contained in this report.

SUMMARY STATISTICS

The sections that follow contain tables of average (mean) scores of participants' responses and are broken down by ABILITY and IMPORTANCE within each *cohort* (i.e., Executive Manager, Senior Manager, Front-Line Manager, Front-Line Team Member) and dimension.

Table 4 below describes the numerical values which were given to the two possible sets of qualitative responses for each of the management DNAs. The averages (means) of these values are the values to be found in the analyses tables.

Table 4: Management DNA Scales

VARIABLE	SCALE	NUMERICAL EQUIVALENT
"AVERAGE ABILITY"	*Strength*	**3**
	Acceptable	**2**
	Low	**1**
"IMPORTANCE"	*Essential*	**3**
	Important	**2**
	Somewhat Important	**1**

***Table 5: Average Scores of Respondents When Describing a MANAGER'S ABILITY* (Scale = 1 – 3)**

A. LEADING

	Exec Mgmt.	Sr. Mgmt.	Mgr.	Front-line Team
1. Builds and sustains enthusiasm	1.6	1.6	2.2	2.1
2. Builds and sustains trust	1.9	1.8	2.7	2.2
3. Demonstrates respect and concern for others	2.3	2.2	2.8	2.4
4. Demonstrates adaptability and flexibility	1.9	1.9	2.6	2.3
5. Demonstrates courage in making decisions	1.7	1.7	2.5	2.3
6. Displays integrity	2.6	2.3	2.9	2.4
7. Seeks and accepts responsibility	1.7	1.7	2.8	2.3
8. Encourages innovation and breakthroughs	1.8	1.7	2.4	2.2
9. Establishes performance standards	1.9	1.6	2.1	2.2

Observations:

1. Items with a mean score of 1.7 or less are noted in **red** text.
2. The Mgr. respondents (i.e., target audience) rated themselves higher than other respondents did on all items in this dimension.
3. The Front-line team gave the Mgrs. favorable scores overall.
4. When compared to the other respondents, the Sr. Mgmt. team rated the target audience (Mgr.) lowest.

Table 6: Average Scores of Respondents When Describing IMPORTANCE (Scale = 1 – 3)

A. LEADING

	Exec Mgmt.	Sr. Mgmt.	Mgr.	Front-line Team
1. Builds and sustains enthusiasm	2.6	2.4	2.5	2.4
2. Builds and sustains trust	2.9	2.6	2.8	2.7
3. Demonstrates respect and concern for others	2.7	2.6	2.7	2.6
4. Demonstrates adaptability and flexibility	2.5	2.5	2.6	2.5
5. Demonstrates courage in making decisions	2.6	2.3	2.5	2.5
6. Displays integrity	3.0	2.8	2.8	2.7
7. Seeks and accepts responsibility	2.9	2.6	2.5	2.5
8. Encourages innovation and breakthroughs	2.6	2.4	2.4	2.3
9. Establishes performance standards	2.4	2.6	2.5	2.5

Table 7: Average Scores of Respondents When Describing a MANAGER'S ABILITY (Scale = 1 – 3)

B. COMMUNICATING

	Exec Mgmt.	Sr. Mgmt.	Mgr.	Front-line Team
1. Conducts effective meetings	1.6	1.8	2.3	2.2
2. Maintains effective team member relations	2.1	1.9	2.6	2.2
3. Maintains effective cross-team relations	1.6	1.6	2.4	2.2
4. Conducts effective presentations	1.5	1.8	2.1	2.2
5. Provides effective written communication	1.5	1.8	2.4	2.2
6. Provides effective verbal communication	2.0	1.9	2.4	2.2
7. Utilizes active listening skills	1.8	1.8	2.4	2.3
8. Provides constructive feedback	1.4	1.8	2.3	2.2
9. Communicates business drivers for IT initiatives	1.6	1.6	2.1	2.2

Observations:

1. Items with a mean score of 1.7 or less are noted in **red** text.
2. The Mgr. respondents (i.e., target audience) rated themselves higher than other respondents did on all items in this dimension.
3. The Front-line team gave the Mgrs. favorable scores overall.
4. When compared to the other respondents, the Exec. Mgmt. team rated the target audience (Mgr.) lowest.
5. The lowest score was from Exec Mgmt. (1.4), which was "Provides constructive feedback."

Table 8: Average Scores of Respondents When Describing IMPORTANCE (Scale = 1 – 3)

B. COMMUNICATING

	Exec Mgmt.	Sr. Mgmt.	Mgr.	Front-line Team
1. Conducts effective meetings	1.9	2.2	2.5	2.3
2. Maintains effective team member relations	2.6	2.7	2.7	2.6
3. Maintains effective cross-team relations	2.1	2.4	2.5	2.4
4. Conducts effective presentations	1.9	2.1	2.2	2.1
5. Provides effective written communication	1.9	2.3	2.5	2.4
6. Provides effective verbal communication	2.5	2.3	2.6	2.5
7. Utilizes active listening skills	2.1	2.5	2.6	2.6
8. Provides constructive feedback	2.6	2.4	2.5	2.5
9. Communicates business drivers for IT initiatives	2.4	2.2	2.3	2.2

Table 9: Average Scores of Respondents When Describing a MANAGER'S ABILITY (Scale = 1 – 3)

C. PLANNING & FORECASTING

	Exec Mgmt.	Sr. Mgmt.	Mgr.	Front-line Team
1. Utilizes appropriate analytical tools and methods	1.9	1.7	2.2	2.2
2. Develops and maintains budgets	2.0	1.7	1.6	2.2
3. Develops and maintains contingency plans	1.5	1.5	2.1	2.2
4. Develops long-term plans	1.4	1.4	1.9	2.1
5. Develops tactical plans	2.3	2.0	2.1	2.1
6. Establishes priorities and timelines	2.0	1.8	2.3	2.2
7. Clearly defines performance expectations	1.4	1.6	2.2	2.1

Observations:

1. Items with a mean score of 1.7 or less are noted in **red** text.
2. On the average, the Front-line Team respondents rated the Mgrs. higher than other respondents did on all items in this dimension.
3. When compared to the other respondents, the Sr. Mgmt. team rated the target audience (Mgr.) lowest.
4. The lowest scores were from Exec Mgmt. and Sr. Mgmt. (1.4), which was "Develops long-term plans." Another low score from Exec. Mgmt. (1.4) was "Clearly defines performance expectations."

Table 10: Average Scores of Respondents When Describing IMPORTANCE (Scale = 1 – 3)

C. PLANNING & FORECASTING

	Exec Mgmt.	Sr. Mgmt.	Mgr.	Front-line Team
1. Utilizes appropriate analytical tools and methods	1.9	2.0	2.2	2.3
2. Develops and maintains budgets	1.7	2.1	2.3	2.2
3. Develops and maintains contingency plans	1.9	2.2	2.4	2.3
4. Develops long-term plans	2.0	2.2	2.5	2.3
5. Develops tactical plans	2.1	2.3	2.4	2.3
6. Establishes priorities and timelines	2.6	2.5	2.6	2.5
7. Clearly defines performance expectations	2.7	2.8	2.6	2.6

Table 11: Average Scores of Respondents When Describing a MANAGER'S ABILITY (Scale = 1 – 3)

D. DIRECTING & COORDINATING

	Exec Mgmt.	Sr. Mgmt.	Mgr.	Front-line Team
1. Assigns responsibilities and accountability	1.7	1.9	2.4	2.3
2. Uses sound reasoning and judgment	2.1	2.0	2.8	2.3
3. Uses appropriate decision-making techniques	1.8	1.9	2.5	2.2
4. Maintains effective internal customer relations	1.9	1.9	2.4	2.3
5. Encourages teamwork and team-building	1.7	1.8	2.6	2.2
6. Maintains effective vendor relations	2.1	2.0	2.2	2.3
7. Monitors and ensures vendor productivity	2.0	1.8	2.1	2.2

Observations:

1. Items with a mean score of 1.7 or less are noted in **red** text.
2. The Mgr. respondents (i.e., target audience) rated themselves higher than other respondents did on all items in this dimension.
3. All respondents gave the Mgrs. favorable scores overall.
4. When compared to the other respondents, the Exec. Mgmt. team rated the target audience (Mgr.) lowest.

Table 12: Average Scores of Respondents When Describing IMPORTANCE (Scale = 1 – 3)

D. DIRECTING & COORDINATING

	Exec Mgmt.	Sr. Mgmt.	Mgr.	Front-line Team
1. Assigns responsibilities and accountability	2.6	2.6	2.5	2.5
2. Uses sound reasoning and judgment	2.7	2.7	2.7	2.6
3. Uses appropriate decision-making techniques	2.5	2.5	2.5	2.5
4. Maintains effective internal customer relations	2.2	2.4	2.5	2.4
5. Encourages teamwork and team-building	2.6	2.5	2.5	2.5
6. Maintains effective vendor relations	1.9	2.0	2.1	2.2
7. Monitors and ensures vendor productivity	2.0	2.2	2.2	2.2

Table 13: Average Scores of Respondents When Describing a MANAGER'S ABILITY (Scale = 1 – 3)

E. STAFFING & DEVELOPMENT

	Exec Mgmt.	Sr. Mgmt.	Mgr.	Front-line Team
1. Confronts and resolves grievances and conflicts	1.2	1.7	2.3	2.1
2. Encourages and supports team member development	1.6	1.8	2.5	2.2
3. Recognizes and rewards superior performance	1.6	2.0	2.3	2.1
4. Utilizes appropriate hiring processes	2.0	1.9	1.9	2.2
5. Uses delegation appropriately and effectively	1.5	1.8	2.1	2.2
6. Identifies and mentors "high-potential" team members	1.4	1.7	2.3	2.0
7. Demonstrates coaching skills	1.4	1.5	2.4	2.2
8. Demonstrates mentoring skills	1.3	1.4	2.4	2.0
9. Utilizes appropriate team member promotion processes	1.7	1.7	2.0	2.0

Observations:

1. Items with a mean score of 1.7 or less are noted in **red** text.
2. The Mgr. respondents (i.e., target audience) rated themselves higher than other respondents did on all items in this dimension.
3. The Front-line team gave the Mgrs. favorable scores overall.
4. The lowest scores were given by Exec. Mgmt. All items except for "Utilizes appropriate hiring processes" were rated a 1.7 or less.

Table 14: Average Scores of Respondents When Describing IMPORTANCE (Scale = 1 – 3)

E. STAFFING & DEVELOPMENT

	Exec Mgmt.	Sr. Mgmt.	Mgr.	Front-line Team
1. Confronts and resolves grievances and conflicts	2.6	2.5	2.5	2.6
2. Encourages and supports team member development	2.4	2.4	2.5	2.6
3. Recognizes and rewards superior performance	2.6	2.4	2.6	2.5
4. Utilizes appropriate hiring processes	2.0	2.3	2.4	2.4
5. Uses delegation appropriately and effectively	2.5	2.4	2.6	2.5
6. Identifies and mentors "high-potential" team members	2.4	2.3	2.4	2.4
7. Demonstrates coaching skills	2.2	2.3	2.3	2.3
8. Demonstrates mentoring skills	2.2	2.3	2.3	2.3
9. Utilizes appropriate team member promotion processes	2.2	2.3	2.3	2.5

Table 15: Average Scores of Respondents When Describing a MANAGER'S ABILITY (Scale = 1 – 3)

F. PROCESSES & RESULTS

		Exec Mgmt.	Sr. Mgmt.	Mgr.	Front-line Team
1.	Analyzes and acts on customer feedback	2.3	2.2	2.5	2.3
2.	Analyzes and improves products or service quality	2.3	1.9	2.5	2.2
3.	Ensures corporate policy compliance	2.4	2.2	2.4	2.4
4.	Holds self and others accountable for quality	1.9	1.8	2.7	2.3
5.	Understands and creates customer value	2.4	2.1	2.5	2.3
6.	Uses benchmarking and "best practices" methodol's	1.6	1.7	2.1	2.1
7.	Maintains effective and efficient work processes	2.0	1.8	2.3	2.2
8.	Utilizes effective time management techniques	1.8	1.7	2.0	2.1
9.	Effectively uses OnQ Project Methodology	1.5	1.7	2.1	2.1

Observations:

1. Items with a mean score of 1.7 or less are noted in **red** text.
2. The Mgr. respondents (i.e., target audience) rated themselves higher than other respondents did on all items in this dimension.
3. The Front-line team gave the Mgrs. very favorable scores overall.
4. The lowest score was given by Exec. Mgmt. (1.5), which was "Effectively uses OnQ Project Methodology".

Table 16: Average Scores of Respondents When Describing a IMPORTANCE (Scale = 1 – 3)

F. PROCESSES & RESULTS

		Exec Mgmt.	Sr. Mgmt.	Mgr.	Front-line Team
1.	Analyzes and acts on customer feedback	2.4	2.5	2.5	2.5
2.	Analyzes and improves products or service quality	2.4	2.4	2.5	2.3
3.	Ensures corporate policy compliance	2.0	2.4	2.5	2.5
4.	Holds self and others accountable for quality	2.6	2.7	2.7	2.6
5.	Understands and creates customer value	2.7	2.4	2.4	2.4
6.	Uses benchmarking and "best practices" methodol's	1.8	2.1	2.2	2.0
7.	Maintains effective and efficient work processes	2.3	2.4	2.5	2.5
8.	Utilizes effective time management techniques	2.0	2.3	2.4	2.3
9.	Effectively uses OnQ Project Methodology	2.8	1.9	2.0	2.2

COMMENTS

The following comments were given by Executive Management during the interview process:

A2 Builds and sustains trust

- *Need guidance on techniques*

A4 Demonstrates adaptability and flexibility

- *Our people are in a state of constant change i.e., always seem to be moving – there have been moves even before our new move.*
- *The focus should be broadened outside of the U.S.*

A5 Demonstrates courage in making decisions

- *They are looking for consensus – they look to others, particularly Senior Management.*
- *They are a brave bunch.*

A6 Displays integrity

- *Good people, but need more proactive leadership; need to step out of the box.*

A9 Establishes performance standards

- *This competency is hard to answer, because I am not in town very often.*

B5 Provides effective written communication

- *Went from small to big fast; since becoming bigger, we have not kept up with written communication effectively; there is more confusion than clarity.*
- *Poor grammar*

B7 Utilizes active listening skills

- *They struggle to listen to alternative solutions outside their comfort factor.*

B9 Communicates business drivers for IT initiatives

- *The perspective is that it is not found to be important at this level; " If I didn't invent it, it doesn't matter" mentality; they need to gain credibility to be able to build a consensus; need to be effective leaders.*

C1 Utilizes appropriate analytical tools and methods

- *Most everyone is hired as an analyst and makes there way to management because of more money or they are getting older. There is an organizational issue – people are placed in the wrong spot.*

C4 Develops long-term plans

- *We are moving so fast that we are in a somewhat reactive mode.*

C5 Develops tactical plans

- *We are in a reactive mode – our speed is too fast.*

C6 Establishes priorities and timelines

- *They may not always be the right priorities.*

C7 Clearly defines performance expectations

- T*his competency is hard to answer, because I am not in town very often. In his "group", yes they do clearly define performance expectations.*

D2 Uses sound reasoning and judgment

- *There is often a U.S. centric focus.*

D4 Maintains effective internal customer relations

- *Busier so not doing as well in this area*
- *Between the different departments, we need improved communication and common goal set. For example, the scorecards could be different, but rely on both teams to achieve them.*

D6 Maintains effective vendor relations

- *Acceptable relationship, but communication and input from other areas within team needs improvement.*

D7 Monitors and ensures vendor productivity

- *There is room for improvement.*

E2 Encourages and supports team member development

- *This competency is hard to answer, because I am not in town very often.*

E3 Recognizes and rewards superior performance

- *Works them to death*

E4 Utilizes appropriate hiring processes

- *We need help recruiting and retaining.*
- *It is frustrating at times.*

E7 Demonstrates coaching skills

- *This competency is hard to answer, because I am not in town very often.*

E9 Utilizes appropriate team member promotion processes

- *Used as a way for compensation rewards – only doing it to give a raise.*

F2 Analyzes and improves products or service quality

- *Issues – bad developmental skills; because of past performance was promoted; Leadership skills is a problem.*
- *We have strong competencies in that area, but limited capacity.*

F4 Holds self and others accountable for quality

- *Need guidance on how to do this constructively.*

F5 Understands and creates customer value

- *Folks horrible – they do not know how to manage a project. The willingness is there.*
- *They want to do what is best for the customer.*

OVERALL COMMENTS

- *Our people are ethical. The problem is they do not have leadership skills. To supplement gaps we have tech skills over leadership skills.*

- *The management team needs to be more open-minded to look outside of their comfort factor/environment they are used to.*

- *Merging creates new ideas, but it takes a while to accept the ideas – new ideas have to go both ways.*

- *Not sure if this is the best way to get to the heart of the problem – problem is lack of leadership skills.*