

XYZ Engineering

Management Training Gap Analysis

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Overview

The HR department at XYZ Engineering has been fielding issues from various personnel issues over the last few years. Personnel changes in management as well as higher than average HR issues in relation to management and turnover within specific teams of the firm has impacted the organization. HR's goal is to determine where the issues lie and how increase team and company morale in those sectors of the firm.

This report will discuss the needs assessment process used including the assessment tools used, the data gathered and results of the overall needs assessment process. Suggested recommendations to assist the larger teams within XYZ to overcome these challenges and morale issues they are currently facing will also be included within the report.

Organizational Profile

XYZ Engineering is a privately held, leading consulting engineering firm that was founded in 1945. The firm is made up of 170 employees, is based in Cincinnati, Ohio, with branch offices in Columbus, Findlay, and Cleveland Ohio as well as Indianapolis, Indiana. XYZ Engineering provides Mechanical, Electrical, Technology (RCDD on staff), engineering design and Commissioning services for buildings and industrial process. They are licensed in 46 states and strive to provide effective engineering solutions to meet the needs of architects, government agencies, building owners, contractors, developers and engineers.

Purpose & Objectives

The assessment approach is intended to help management identify and address specific management and personnel issues. XYZ prides itself in having a unique corporate culture that

helps them stand out against the competition. Recent communications via reviews and exit interviews has revealed that there seems to be a gap in the performance perception of management on some of our larger teams versus how the employee's feel about their abilities and management style. XYZ would like to perform an assessment to try to interpret what specific issues are causing this issue and potential ways that could correct it. The Executive Committee wants to identify if this is merely a perception issue or are there underlying team management issues fermenting within the larger teams. The normal team size is 9-14 employees while the larger teams have 20+ on staff so management needs to verify if this is a systemic issue among the larger teams or if this is only an issue with one specific team.

The assessment approach assists to generate the needed evidence to determine the appropriate resolutions to address the management personnel issues in an integrated, systematic method.

Methodology

While it was somewhat difficult to collect data since many engineers are highly introverted and were reluctant to share their thoughts or opinions the analyst was still able to verify information and situations based on their rapport with various employees.

The population research included anonymous surveys from sixty-six employees and interviews were conducted with eight large Team Managers. All Team Managers have been with the company for ten years or more while the population sample ranged from co-op to thirty five plus years with XYZ Engineering. The large team sample break-down is as follows:

Team 5 3 Senior Team Managers / 1 Associate Team Manager / 23 Employees

Team 6 2 Senior Team Managers / 24 Employees

Team 7 1 Senior Team Manager / 1 Associate Team Manager / 19 Employees

The methodology was designed to assess internal entities and factors that determine the gaps between management personnel training and what is needed to continue the XYZ culture the staff is accustomed to.

Proposal

The needs assessment will accomplish the following:

1. Determine if, when, where, and how a lack of management supervisory skills and knowledge affect employee performance and morale on the “large” teams.
2. Review management training records for any prior supervisory training that has been conducted or that may be needed to increase management supervisory skills, knowledge and create higher morale.
3. The needs assessment has five phases. Upon completion of each phase, the analyst and the Director of Administration will review a draft report that summarizes the process and outcomes. They will also review the proposed processes for completing the entire needs assessment. All data collection will be completed on-site; however, all data analysis and report writing will be completed off-site. The analyst will group the data; no individual data will be reported since the surveys will be anonymous.
4. The final report will be presented to the Executive Committee for the final decision on what recommendations will be implemented.

Note that this needs assessment focuses on knowledge and skill needs of the “large” Team Managers and the effects it has on the overall employee morale. Therefore, if in Phase 1 of the project, gather preliminary data about the suggested needs, and reveals that a lack of knowledge

and skills does not contribute significantly to the performance problem, the needs assessment will be restructured or discontinued.

Data Collection

The core segments of the needs assessment process was estimated to take about three to four weeks to fully complete. Each phase implemented took four to five days of preparatory work and two to three days to conduct and assemble the results to prepare for the next phase.

Due to implementing surveys of the “large” teams the actual data gathering time was about two weeks with an additional five days to review the data, complete the analysis and compile a final report with the appropriate recommendations.

Also, because of the open ended nature of the surveys and interviews, each one was different and focused on various aspects of the team. This allowed the analyst to gather a broader depth of information and enabled each participant a chance to discuss the area most impacted by them.

During the assessment a combination of interviews and a survey were implemented to get the data needed to conduct the analysis. The analyst also referred to historical information provided via exit interviews, past performance reviews as well as first-hand experience with HR personnel issues. Due to the timing of the survey, management requested that additional data be collected pertaining to the overall culture of the organization in the survey.

The job descriptions, performance reviews and personal experience gave the insight needed into the everyday tasks performed by the team members for the task analysis. An anonymous survey was conducted to determine overall perceptions of training needs, management personnel issues and the overall morale of XYZ.

Collection Instruments

Review data: Job description for various positions including Team Manager was reviewed to understand the major activities involved in performing the job and the conditions under which these activities are typically performed. Data included historical data on reviews and training records. The analyst also reviewed literature on management best practices from similar organizations and professional journals including PSMJ.

Interviews: Of the individuals holding the management position and Executive Committee.

Direct Observation: The analyst has been present for many of the exit interviews and HR personnel issues over the past few years. The time spent in those meetings was recorded via direct observation.

Survey: As mentioned previous, an anonymous survey was conducted which due to timing management requested questions about the overall morale and culture of the company be included as well. The analyst will be using www.Surveymonkey.com as an outside source to gather the information.

Results

Workforce engagement is one topic that is evident in most areas but still has room for growth within the organization. Although there is a learning and development system in place, open communication is a serious concern for many. They feel it is only preached that there is open communication, but that is not felt within. Training skills and levels are often assessed by the various MEP departments but not within the actual team realm since that would mean that the managers are effectively communicating with their staff and they currently are not.

Gap #1: Formal management personnel training

A very significant gap is the absence of formal management personnel training. Training records, personnel files and interviews revealed little to no personnel training conducted prior to being named Team Managers. In the past, it has been XYZ's protocol that if an employee was successful as a Project Manager that they would also be successful as a Team Manager, managing projects as well as employees. Unfortunately, this is not the case and there is a significant lack in skillset needed to manage employee issues.

Gap #2: Poor Internal Collaboration (HR not a strategic partner)

Information derived from surveys and research revealed that employees did not feel that HR was a strategic partner with Principals and line managers. Currently, HR is only viewed as a source for benefits questions or disciplinary actions. Also, while HR and management would conduct reviews, one Team Manager in particular was not closing the loop and meeting with their employees. Many employees interviewed stated they had not had a formal review in many years. Management needs to realize that performing HR activities in a strategic manner allows the company to prepare for change, forecast potential human capital needs and develop performance systems that support strategic objectives all while allowing their employees to voice an opinion and be heard by management (PSMJ, 2014). According to the SHRM survey 90% of successful company's believe that feedback from an employee's direct supervisor, combined with feedback from others including (directors, peers, direct supervisors), provides a more complete picture of employee performance when related with feedback from direct supervisors only.

Gap #3 Poor management communication with employees.

The dynamic within XYZ Engineering is drastically changing; many employees are retiring and replacements are being hired but managing millennial employees is not the same as managing their predecessors. Millennial employees crave guidance, and they want to look at management as leaders for personal and professional feedback (PSMJ, 2014). In a study conducted by SHRM (Society of HR Management), in 2013 54% of employees stated that their job satisfaction was directly related to the relationship with their immediate supervisor. Team Managers need to include professional development time for coaching and instructing younger team members to allow them to feel part of the team. In the current highly competitive market, it is imperative that XYZ strengthen personnel relationships.

It is interesting to note that Team 5 had the most concerns, which seems to be contributed to the amount of time the Senior Team Manager is out of the office.

Obstacles

Soliciting honest feedback and first-hand experiences were the most significant obstacle. Fear of retaliation from some managers whether it was perceived or real was their initial reaction. If the assessment had truly been provided by a third party, it may not have been as difficult but after assuring the participants that the survey was truly anonymous and without their assistance, change could not be initiated. This conversation allowed them to open up and give their opinions and thoughts to various issues.

The other forms of data collection were easy since the analyst had prior exposure to the firm and knew where to find information in a timely manner.

One ongoing obstacle will be to get the Team Manager with the most issues to delegate his personnel responsibilities to another person.

Recommendations

Recommendations: Gap #1: Formal management personnel training

- Develop and implement their own leadership process or access an external development process from a consultant, local university, etc.
- Ensure all management personnel undergo leadership development training and develop a personal development plan while being mentored for management.
- Ensure all current and future managers understand the importance of their personal leadership, their overall responsibility to demonstrate their leadership and mentoring of other employees.

Recommendations: Gap #2: Poor Internal Collaboration (HR not a strategic partner)

- Allow HR to assist with those reviews that management is too busy to handle or they need to delegate the duty to someone else in the team in order to complete reviews in a timely manner.
- Request the “Team 5” manager delegate many of the personnel duties to one of the other Team Managers due to his ongoing travel schedule so the employees get timely and appropriate feedback.
- Verify overall morale and culture improvement by re-conducting the confidential survey at a later date (within 12-18 months).

Recommendations: Gap #3 Poor management communication with employees.

- Open communication needs to come from the top down also tying this with the measurement would see significant results.
- Provide training time, knowledge and other resources necessary for personnel to build rapport with employees. Team Managers must delegate other responsibilities in order for them to provide the appropriate feedback and mentoring to build morale.
- Request the “Team 5” manager delegate many of the personnel duties to one of the other Team Managers due to his ongoing travel schedule so the employees get timely and appropriate feedback.
- Develop an ongoing process that encourages all managers to conduct individual interactions with employees to assist in building relationships and providing constructive criticism and positive feedback on their work and growth.
- Create EDP’s (Employee Development Plans) for all employees needing to be mentored and assign a mentor to assist with the transfer of knowledge process. The Team Manager needs to view either quarterly or semi-annually depending on the depth of tasks involved.

Reflections

Appropriate and timely communication seems to be a key factor in many of the company’s issues. While some of this is due to the introverted demeanor of many engineers, it needs to be a strategic goal to be better communicators across the entire company. Managing employees today is not the same as it was a decade ago and must be handled as such. Also while there is a learning system in place to cultivate engineers, that same system is not in place to develop managers and leadership within the firm. Managers need to be appropriately trained to manage

people and not just projects for people. They are vastly different skill sets and needs to be addressed as such.

Costs and Benefits

The costs for the project and overall implementation are minimal in comparison to having to hire and train additional employees when others leave due to lack of management communication. Cost for training will depend on the candidate and depth needed and the benefits are invaluable.

Lessons Learned

Needs assessments can be very valuable for organizations and uncover issues that they may never have realized until it was too late. In-depth research, preparation and use of appropriate data collection tools are vital to conducting a successful needs assessment. As an HR professional with no prior needs assessment experience, preparation and phase implementation was helpful during the process. It is also important to note that having the support, buy-in and open communication with the final decision makers can set the tone for the level of success for the project.

References

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Appendix A

Interview Questions for Employer Participants

1. Why did you pick this career?
2. What do you want from your career?
3. Why do you work at XYZ Engineering?
4. What motivates you?
5. When do you feel the most productive?
6. How should we measure your performance?
7. How do you measure your performance?
8. What makes you feel successful?
9. How would you define the “XYZ Culture”?
10. What do you think makes the best corporate culture?
11. Have you worked in another corporate environment?

_____ Yes _____ No

If yes, what did you like better about their culture?

12. What does XYZ do better than your prior environment?
13. How well does XYZ maintain relationships with employees?

1 being very effective -

5 being ineffective.

14. Do you have suggestions on how representatives of XYZ could improve & maintain relationships?

15. Do you feel that your opinion is heard when you approach your Team Manager?

_____ Yes

_____ No

16. Do you feel your opinion is heard when you approach HR?

_____ Yes

_____ No

17. Do you feel you are provided with enough training and mentoring?

_____ Yes

_____ No

If no, what do you feel you are lacking?