

The Pathway from Knowledge to Practice

Map Out Your Project Management Mentoring Program

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Introduction

A key strategy in the quest to improve project performance is the implementation of a formal project management mentoring program. Mentoring promotes optimal job performance of project managers by establishing formal, supportive coaching relationships, communications, and performance feedback. Mentoring involves coaching and assistance on the part of the mentor, and openness and collaboration on the part of the mentored. As a shared activity, the mentor and mentored define clear, quantifiable project management performance objectives. The mentor then provides just-in-time training and support to the mentored in the execution of project management best practices.

Management Concepts Professional Project Management Mentoring Program is designed to provide value to both individual project managers and the organization sponsoring the mentoring program. Therefore, the benefits of the program are twofold:

- It provides support for project managers to ensure that their projects are completed on time, within budget, and with the required quality.
- It increases the project management maturity and the effectiveness of the project managers participating in the program.

Mission

By aligning project managers with senior and more experienced project management professionals, project managers will be exposed to an array of information, tools, techniques,

and best practices that have been learned and successfully applied throughout their mentor's career. As a result, project managers will increase project performance and the organization will realize the expected return on project investments.

Objectives

The primary objective of the Project Management Mentoring Program is to optimize the capabilities of each project manager to ensure that projects are completed on time, within budget, and with the desired quality. Toward that end, Management Concepts has designed its mentoring program to accomplish the following:

- ✦ Achieve business objectives through successful project completion
- ✦ Ensure that project cost, schedule, and quality goals are met
- ✦ Improve individual project manager skills
- ✦ Contribute toward raising organizational project management maturity
- ✦ Identify internal client candidates to become project management mentors and transfer direction of the program into the organization

Measures of Success

Measures of the success of the program include the following. Additional measures will be added for unique client goals.

Goal #1: Successful project completions for projects managed by mentoring program participants.

Metric: Client portfolio reporting implemented for projects managed by mentoring program participants.

Goal #2: Increased project manager skill levels.

Metric: Results of the project manager skill assessment survey at the start of the mentoring program compared to periodic checkpoint assessments.

Goal #3: Delivery of high quality mentoring and coaching to client.

Metric: Mentoring program evaluation survey administered to the mentored at periodic checkpoint reviews.

Benefits

A formal Project Management Mentoring Program provides benefits for both the mentor and the mentored.

For the mentored:

- ✦ Increased confidence and motivation
- ✦ Effective and efficient approach to projects
- ✦ Opportunities to practice project management tools and techniques
- ✦ Protected feedback – 'no risk' reviews
- ✦ Networking – access to other professionals
- ✦ Access to information and best practices
- ✦ Support to ensure successful project performance

For the mentor:

- ✦ Career enhancement
- ✦ Increased pride and satisfaction
- ✦ Increased competency and confidence
- ✦ Enhanced challenges and interest
- ✦ Enhanced coaching and feedback skills
- ✦ Increased connection with events across the enterprise

Program Participants

To implement a formal project management mentoring program, participation is required on the part of those filling the following roles.

Mentoring Program Director

The program director provides overall leadership and management of the mentoring program. This role is accountable for program quality and consistency, program performance reporting against measures of success, and selection and growth of mentors and those mentored. In addition, the program director is responsible for timely communication to, and integration with, functional managers and executive sponsors.

Team of Mentors

The mentors provide hands-on project management mentoring and coaching for a group of mentored.

Group of Mentored

The mentored must agree to participate proactively in the mentoring program. They are expected to complete all assignments outlined in the coaching plan.

Functional Managers

Functional managers must understand and support the mentoring program and the individual coaching plans drafted for their direct reports. The functional manager incorporates the project management coaching plan components into the associate's professional development plan and works closely with the mentor to provide consistent direction to the mentored.

Mentoring in Practice

Management Concepts Project Management Mentoring Program provides a best practice approach to formal mentoring. It is important that the mentoring team execute a standard approach to mentoring to maintain consistency and to establish the foundation for continuous improvement.

To promote consistency, tools and templates are provided to facilitate the mentoring process. These include templates for the coaching plan and coach-

ing log, a mentor support checklist, and a mentoring program evaluation form.

Sequential process steps for successful implementation of the mentoring program are listed below:

1. Program Launch

The mentoring program director and team of mentors meet to review the contents of the Management Concepts *Mentoring Program Practice Guide* and customize their approach for any unique client requirements.

The mentoring program director and team of mentors conduct the mentoring program launch meeting. This program kickoff meeting is conducted with the entire group of project managers, the functional managers they report to, and the mentoring program executive sponsors.

The purpose of the kickoff meeting is to launch the mentoring program. The executive sponsor formally launches the mentoring program, explains the need for increased project management maturity, and outlines the role the mentoring program will play in the overall project management improvement initiative.

The mentoring program director, mentors, and those to be mentored are introduced. The program director sets expectations for the time commitment required from all participants. The program director also discusses the concept of mentoring and the purpose of the mentored coaching Plan.

2. Introductory Mentor/Mentored Meeting

Following the kickoff, the mentor quickly schedules a one-on-one introductory meeting with each mentored. The purpose of the introductory meeting is to:

- Begin the mentoring process
- Begin to build the relationship between the mentor and mentored
- Examine the expectations of the mentored

- ✦ Discuss the concept of mentoring and the purpose of the coaching plan
- ✦ Determine current project challenges facing the mentored
- ✦ Document project-related issues and areas of concern for the for projects managed by mentoring program participants.

3. Diagnostic Activities

Begin Weekly One-on-One Coaching Sessions

The mentor conducts weekly coaching sessions to address specific competencies and areas for improvement, including but not limited to:

- ✦ Meeting preparation and meeting management
- ✦ Schedule analysis
- ✦ Issue/risk management
- ✦ Communication management
- ✦ Change management
- ✦ Integration management

In addition to scheduled coaching sessions, the mentor makes himself available for as-needed, real-time project management mentoring to project managers and team members as they encounter challenges and issues on their projects.

In the coaching log, the mentor summarizes all coaching session discussions with the mentored.

Administer Project Manager Skill Assessment Survey

Mentors administer the project manager skill assessment survey to each mentored to baseline the skill levels of the project managers.

Begin to Attend Weekly Project Team Meetings

The mentor attends project team meetings for each mentored. The mentor acts as an observer to assess the effectiveness of the team structure and process, and to provide expert judgment and advice to the

mentored relative to project risk and issue management.

In addition, the mentor provides feedback to the mentored regarding meeting management, team leadership, schedule management, and team building skills.

4. Coaching Activities

Develop Mentored Coaching Plan

The mentor and mentored collaboratively develop a customized project management coaching plan. Ongoing reviews are conducted to determine progress against the plan. The coaching plan objectives must be practical, time bound, and specific. The coaching plan focuses on project success and project management skill enhancement.

The coaching plan is collaboratively developed by the mentor and mentored collaboratively. It represents a commitment on the part of the mentored to follow, and the mentor to provide assistance and support.

The coaching plan is then communicated to the project manager's functional manager to achieve buy-in and to be incorporated into the individual's professional development plan.

Conduct Coaching Sessions

The mentor continues one-on-one coaching sessions to review and update the coaching plan, and observes the weekly project team meetings to provide feedback and advice on team effectiveness.

On occasion, the mentor may serve as facilitator for project planning workshops and risk management sessions to provide independence, and to model facilitation techniques.

Conduct Informal Group Training Meetings

The mentoring program director conducts small group meetings with participating project managers to discuss common issues (e.g., budgeting and cost management, organizational policies and standards,

meeting management, risk management, and procurement management) and to promote:

- Standard project status reporting to feed the enterprise portfolio reporting system
- Lessons learned
- Continuous improvement of practices
- Best practices knowledge transfer

This meeting can evolve into an effective forum to solicit feedback on the effectiveness of organizational project management tools, techniques, and standards.

Conduct Formal Group Training Sessions

The mentoring program director reviews coaching plans and consolidates training requirements for all project managers to schedule formal training classes focused on areas of common concern for the mentored group.

Note: After training sessions are conducted, the mentors/mentored rework their coaching plans to provide immediate, practical application of the specific tools and techniques provided during training.

5. Continuous Improvement Activities

Conduct Mentoring Program Lessons Learned Workshops

The mentoring program director conducts facilitated lessons learned sessions with all project managers and other program stakeholders. The purpose of these sessions is to determine the level of satisfaction with the project management mentoring program and gather recommendations for improvement.

At the lessons learned session, all participants complete a program evaluation form to provide quantitative feedback on the program's effectiveness.

Conduct Checkpoint Quality Reviews

The mentoring program director and team of mentors present a formal review of the mentoring program's progress against the measures of success to the program's executive sponsors.

Improve Mentoring Program

The mentoring program director incorporates feedback from lessons learned and review sessions into the mentoring program, and trains the corps of mentors on the improvements.

The Mentor/Mentored Relationship

Compatibility, concern, participation, and action are characteristics of a successful mentor/mentored relationship. From the beginning, the mentoring program must foster an atmosphere of helpfulness and open communication. This — combined with consideration, good listening, honesty, and a healthy dose of reality — makes for a successful relationship.

Components for building a successful one-on-one mentoring partnership include:

- The mentored should be led through a productive personal assessment identifying strengths, weaknesses, skill development needs, career expectations, and objectives.
- Together, the mentor and mentored should establish expectations and goals.
- The mentor and mentored should develop a decision-making process for collaboratively evaluating professional opportunities and expectations.
- The mentor should know the norms, values, expectations, and policies of the organization.
- Timelines and goals for improvement areas should be clearly addressed.
- Both the mentor and mentored should accept responsibility for fulfilling their jointly-created coaching plan.

The Mentor Role

The primary function of the mentor is to facilitate the project success for the mentored, and professional project management growth through the development and execution of the coaching plan. The coaching plan is a tool used to document project management development and progress of the mentored. The coaching plan includes activities to both improve project performance and increase the project management skill set of the mentored.

The mentor supports the mentored in the following capacities:

- Acts as the professional project management development coach
 - Educates the mentored on best practices
 - Ensures effective understanding of organizational project management policies and procedures
 - Supports development of specific project management deliverables
 - Performs quality reviews of specific project deliverables
 - Ensures that the project is on track
 - Assists in resolving project issues and risks
- Recommends appropriate intervention actions if the mentored's project is in trouble.

To develop knowledge and skills, the mentor:

- Administers a formal project manager skill assessment survey at the start of the program and at the key checkpoints within the program.
- Provides orientation on project management practices and methods.
- Provides professional guidance to the mentored on the journey to professional maturity.
- Recommends appropriate project management training.
- Provides periodic reviews and performance feedback relating to project management.

Mentor Functions

There are four major mentor functions in the project management mentoring program, including:

- Develops coaching plan with mentored.
- Reviews coaching plan with the mentored's manager.
- Conducts timely, periodic development and communication sessions with mentored.
- Provides formal project management performance documentation and feedback.

Mentor Responsibilities

Since the mentoring program has two central areas of focus, responsibilities of the mentor fall into two categories.

To ensure project performance, the mentor:

- Reviews organizational project management policies and guidelines with the mentored including, the client's project life cycle methodology.
- Supports execution of project management practices by the mentored.
- Transfers knowledge of project management best practices to the mentored.

Mentor Deliverables

The mentor is responsible for developing and maintaining critical program documentation deliverables, including skill assessment results, coaching plans, and coaching logs that document the content of coaching session discussions with the mentored.

Mentoring Guidelines

The following guidelines enhance the mentor/mentored relationship:

- If not currently certified, help the mentored develop a project management certification

plan. If certified, help develop a plan to stay current.

- ✦ Maintain continuous contact with the mentored. Conduct weekly, face-to-face meetings to review status and discuss issues.
- ✦ On a weekly basis, review a subset of mentored deliverables, for adherence to project management methods and standards.
- ✦ Maintain a positive relationship with the mentored's functional manager to solicit his or her recommendations or feedback on the mentored's project performance. Do not provide negative information about the mentored to their functional manager; the relationship between the mentor/mentored must be safe and remain confidential.

Mentor Capabilities

Required mentor capabilities include the knowledge, skills, and techniques for effective leadership and professional guidance. Mentors should be chosen from the ranks of senior program/project managers within the organization. Candidates must have:

- ✦ Experience in successfully managing large, complex projects
- ✦ Considerable formal project management training — Project Management Professional (PMP®) certification through the Project Management Institute is preferred
- ✦ Strong leadership, team building, interpersonal, consensus building, conflict resolution, written and oral communication, and group facilitation skills

Mentor Characteristics

While mentoring is a positive experience that provides new challenges and increased pride and satisfaction, not everyone is comfortable in the role. When selecting mentors for the program, consider individuals who possess many of the following characteristics:

- ✦ Project focused, organized, and disciplined
- ✦ Good communicator, motivational, and welcomes change
- ✦ Educates peers and subordinates, a good listener, and presents negative feedback well
- ✦ Patient, honest, admits mistakes, and positive
- ✦ Plans before acts, decisive, self-confident, and enthusiastic
- ✦ Impartial, unbiased, and recognizes excellence
- ✦ Knowledgeable, respected, and goal-oriented
- ✦ Good understanding of project management, general management, and coaching and feedback

The Mentored Role

The mentored project manager is expected to proactively pursue growth opportunities to achieve project management improvement goals and effectively meet project success criteria.

The mentored participates in an assessment of strengths and weaknesses, and communicates with both the functional manager and mentor to continuously broaden and improve project management capabilities. Through the program, the mentored has access to an on-site coach in a "no risk" environment, to increase confidence, motivation, and improve project management performance, thus leading to career advancement.

Mentored Functions

The mentored is responsible for carrying out the following functions:

- ✦ Complete the project manager skill assessment survey.
- ✦ Collaboratively develop the mentored coaching plan with the mentor. This plan is developed using information from the project manager skill assessment survey results and other development areas identified through discus-

sions with the mentor and a review of project challenges.

- Discuss the coaching plan with their functional managers, incorporating the elements of the coaching plan into their professional development plans.
- Participate in progress meetings with the mentor — preferably weekly, face-to-face sessions. The mentor will document progress on the mentored coaching plan during the coaching progress meetings.
- Implement coaching and project management improvement activities embodied in the coaching plan.

Mentored Guidelines

The following guidelines are presented to assist the mentored in developing a strong relationship with the mentor to enhance the mentoring experience:

- Identify desired training areas to improve:
 - Specific skills
 - Basic project management fundamentals
 - Professional certifications
- Create and maintain a training plan as a part of the coaching plan.
- Interact with your mentor in developing your career plans.
- If not currently certified, develop a PMP® certification plan. If certified, develop a plan to keep the certification current.
- Review project management career path options with mentor. Develop an action plan for career advancement. Incorporate the actions in the coaching plan.
- Facilitate the review process with the mentor and functional manager.
- Identify key team members to provide input on your project management style and competencies.

- Discuss and document lessons learned from project experiences with your mentor.
- Review skills assessment for possible updates to the coaching plan.
- Discuss interests and possibilities for upcoming assignments with your mentor and functional manager.

The Functional Manager Role

Functional managers provide direction and guidance on organization-related activities and practices (including the project management mentoring program) to the project managers whom they supervise. In addition, the functional manager:

- Provides mentored job orientation
- Manages and monitors the mentored's overall performance
- Supports and encourages implementation of all activities in the coaching plan
- Provides formal feedback documentation and communication on the mentored's performance

Functional Manager Functions

The functional manager performs significant functions in the project management mentoring program:

- Establishes project management performance expectations for the mentored
- Reviews the mentored's project management coaching plan with the mentor and mentored
- Monitors and provides informal feedback on project management performance to the mentored

Functional Manager Deliverables

The functional manager is responsible for assignment of project management roles and responsibilities.

ties, and communication of project management expectations.

Functional Manager Guidelines

These guidelines are provided for functional managers to develop a successful relationship with both the mentor and mentored:

- Assign specific roles and responsibilities for projects.
- Demonstrate and communicate support for the project management mentoring program.
- Discuss lessons learned and share proven best practices.
- Perform formal reviews of project performance.
- Provide feedback to mentor for incorporation into the coaching plan.
- Provide information to the mentor for professional project management development of the mentored
- Provide feedback to the mentored in support of the activities embodied in the coaching plan.

Organizational Project Management Maturity

According to Harold Kerzner, Ph.D., project management is a competitive weapon that brings higher quality and added value to the customer. The project management mentoring program is but one tool to help build a project-centric organization. The project management mentoring program is focused on providing knowledge and support to the individual project manager on the front line. It is assumed that the organization that is implementing the mentoring program is also continuously working to improve project management maturity at the enterprise level.

Project management maturity is defined as the degree to which an organization has assimilated the tenets of professional project management by consistently achieving cost, schedule, and customer sat-

isfaction goals, thus adding value to the business. Continued focus on implementing and improving standard, proven processes is also key to achieving project success.

Accepted project management maturity models provide a roadmap for project management improvement. The maturity models are used to determine the current maturity level of an organization, and therefore, the key process areas that should be worked on at each juncture.

Organizational maturity levels are commonly classified as:

- **Level 1 — Ad Hoc or Initial.** No formal project management knowledge processes or competencies
- **Level 2 — Planned or Adapted.** Project management concepts, knowledge, and process standards used at project level; professional support
- **Level 3 — Managed or Structured.** A structured, systematic process is applied throughout the organization; project management mentoring
- **Level 4 — Integrated.** Project management is controlled and strategic; professional development and career path options exist; projects support the organization's business goals
- **Level 5 — Sustained or Synthesized.** Fully functioning Program Office; continued process improvement

Central to the concept of organizational maturity models is the notion that the key process areas of the prior level must be institutionalized before attention to areas at the higher levels will achieve optimum results. As you can see, *project management mentoring is a key process area for Level 3*. The mentoring program will therefore reap the highest return on investment if the organization implements standard, proven processes, provides a source of training and knowledge on the processes, and provides support to the project teams during project execution.

Critical Success Factors

Achieving high levels of project management maturity requires a substantial cultural change effort for most organizations. A project-driven culture and climate is critical to the success of the project management mentoring program implementation. Elements of a project-driven organization include the following:

Cultural

- Clear vision of project management's role in organizational success
- Cross-functional communication
- Knowledgeable and committed management
- Involved customers
- Realistic expectations for planning and reporting

Organizational

- Standard methodology
- Effective project team support
- Accountability
- Clear authority
- High-performing, cross-functional teams

Change Management

Change management strategies to ensure the success of the mentoring program include:

- Communicating the need for increased project management maturity and explaining the role of the mentoring program
- Assessing the organization's willingness to improve project delivery capability
- Identifying obstacles to change and determining strategies to overcome them
- Identifying management's role in the implementation of the program
- Drafting a plan to implement the program, and executing and statusing against the plan

Implementation Approach

Management Concepts professional consulting services will implement the program in the client environment; assign experienced, professional mentors; fulfill the mentoring role for a time while identifying and training a corps of client mentors; and transition ownership of the mentoring program to the client.