📊 Mentor Assessment of Mentee Template

🎯 Instructions

Use this template to assess your mentee's project management competencies based on your initial discussions and their self-assessment. This evaluation will help identify development priorities and create a targeted growth plan.

📈 Skill Assessment Scale

- **1: Novice** - Limited experience, requires significant guidance
- **2: Developing** - Basic understanding, needs regular support
- **3: Proficient** - Solid capabilities, occasionally needs assistance
- **4: Advanced** - Strong performance, works independently
- **5: Expert** - Exceptional skills, can teach and lead others

📋 Skill Clusters Assessment

1️⃣ Core Project Management Skills (30%)

Project Planning & Scope Management | Rating (1-5): ___

- **Observations**:
- **What to look for**: Evidence of using planning tools (WBS, Gantt charts), clear scope definition, milestone setting, and boundary management.
- **Development suggestions**:

Time & Priority Management | Rating (1-5): ___

- **Observations**:
- **What to look for**: Use of prioritization techniques, delegation skills, ability to negotiate deadlines, and time management tools.
- **Development suggestions**:

Change Management | Rating (1-5): ___

- **Observations**:
- **What to look for**: Process for evaluating change impacts, communication of adjustments, and maintaining project momentum during changes.
- **Development suggestions**:

Methodology Application | Rating (1-5): ___

- **Observations**:
- **What to look for**: Understanding of when/why to use specific methodologies, ability to tailor approaches to project needs, and implementation of appropriate processes.
- **Development suggestions**:

Business Alignment | Rating (1-5): ___

- **Observations**:
- **What to look for**: Connection of project tasks to strategic objectives, stakeholder value focus, and business case understanding.
- **Development suggestions**:

2️⃣ Interpersonal and Leadership Skills (20%)

Conflict Resolution | Rating (1-5): ___

- **Observations**:
- **What to look for**: Active listening, impartiality, win-win solution focus, and appropriate escalation when needed.
- **Development suggestions**:

Persuasion & Influence | Rating (1-5): ___

- **Observations**:
- **What to look for**: Effective use of data/evidence, relationship building, stakeholder analysis, and tailored communication.
- **Development suggestions**:

Communication Effectiveness | Rating (1-5): ___

- **Observations**:
- **What to look for**: Clarity in verbal/written communication, audience adaptation, use of visuals, and verification of understanding.
- **Development suggestions**:

Team Leadership | Rating (1-5): ___

- **Observations**:
- **What to look for**: Motivation techniques, recognition practices, effective delegation, and team culture building.
- **Development suggestions**:

Feedback Management | Rating (1-5): ___

- **Observations**:

- **What to look for**: Openness to criticism, constructive feedback delivery, and integration of feedback into project plans.

- **Development suggestions**:

3️⃣ Analytical and Strategic Skills (15%)

Risk Assessment | Rating (1-5): ___

- **Observations**:

- **What to look for**: Systematic risk identification, contingency planning, probability/impact analysis, and proactive mitigation.

- **Development suggestions**:

Data-Driven Decision Making | Rating (1-5): ___

- **Observations**:

- **What to look for**: Evidence of using metrics to guide decisions, analysis skills, and measurement of project success.

- **Development suggestions**:

Strategic Alignment | Rating (1-5): ___

- **Observations**:

- **What to look for**: Connection of project activities to organizational strategy, portfolio perspective, and value maximization.

- **Development suggestions**:

Innovation & Problem-Solving | Rating (1-5): ___

- **Observations**:

- **What to look for**: Creative solution development, structured problem-solving approaches, and root cause analysis.

- **Development suggestions**:

Adaptive Thinking | Rating (1-5): ___

- **Observations**:

- **What to look for**: Flexibility when plans change, quick reprioritization, and resilience during setbacks.

- **Development suggestions**:

4️⃣ Technical Proficiency (25%)

Tool Mastery | Rating (1-5): ___

- **Observations**:
- **What to look for**: Proficiency with PM software, utilization of advanced features, and appropriate tool selection.
- **Development suggestions**:

Methodology Implementation | Rating (1-5): ___

- **Observations**:
- **What to look for**: Participation in methodology ceremonies/processes, adaptation of methods to project needs, and governance understanding.
- **Development suggestions**:

Technical Adaptability | Rating (1-5): ___

- **Observations**:
- **What to look for**: Speed of learning new tools, proactive skill development, and comfort with technical challenges.
- **Development suggestions**:

Reporting & Visualization | Rating (1-5): ___

- **Observations**:
- **What to look for**: Creation of clear reports/dashboards, meaningful metrics selection, and data visualization skills.
- **Development suggestions**:

Process Automation | Rating (1-5): ___

- **Observations**:
- **What to look for**: Identification of automation opportunities, implementation of process improvements, and efficiency focus.
- **Development suggestions**:

5️⃣ Learning and Development (10%)

Professional Development | Rating (1-5): ___

- **Observations**:
- **What to look for**: Pursuit of certifications/training, application of new knowledge, and self-improvement focus.
- **Development suggestions**:

Mentoring Experience | Rating (1-5): ___

- **Observations**:
- **What to look for**: Coaching approach, knowledge sharing willingness, and development of team members.
- **Development suggestions**:

Industry Knowledge | Rating (1-5): ___

- **Observations**:
- **What to look for**: Awareness of PM trends, professional network engagement, and continuous learning attitude.
- **Development suggestions**:

Lessons Learned Process | Rating (1-5): ___

- **Observations**:
- **What to look for**: Reflection practices, documentation of lessons, and application of past experiences.
- **Development suggestions**:

Feedback Culture | Rating (1-5): ___

- **Observations**:
- **What to look for**: Solicitation of input, constructive feedback delivery, and implementation of suggestions.
- **Development suggestions**:

📝 Development Plan

Strengths Summary

1.
2.
3.

Growth Areas

1.
2.
3.

Recommended Development Track

☐ Define Stage (Building foundational skills)

☐ Develop Stage (Enhancing existing capabilities)
☐ Scale Stage (Mastering advanced competencies)

Proposed Development Activities

1.

2.

3.

Success Metrics

1.

2.

3.

Timeline for Next Assessment

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📋 Feedback From Initial Session

Session Summary:

Key Observations:

Action Items for Mentor:

Action Items for Mentee:

Resources to Share:

Next Meeting Focus: