

PMI Sweden Mentoring Handbook

Version 2.1

Director Mentoring PMI Sweden Chapter

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1 Introduction

1.1 Background

Founded in 1969, PMI is one of the world's largest not-for-profit membership associations for the project management profession, with several well known credentials like the PMP which was established 1984 and it is still the gold standard in project management certification, though there are many more credentials now.

The PMI Sweden Chapter Mentoring Program is an opportunity available to PMI Sweden members to develop as professional project managers. The scheme started in 2018 and leveraged work previously performed by PMI UK Chapter and the PMI Montreal Chapter (both influenced by other PMI chapter Mentoring schemes).

1.2 Purpose of the scheme

PMI Sweden provides a free to members Mentoring scheme with the following aims:

- Improving the project management skills of the Mentee
- Career development;
- PM specific soft skill development

Our Mentoring Program will not cover:

- Seeking job opportunities or help in certification.

Our role is to connect suitable mentors and mentees, support the initial engagement and provide ongoing support as needed.

1.3 What is Mentoring?

Mentoring is a powerful personal development and empowerment tool. It is an effective way of helping people to progress in their careers and is becoming increasingly popular as its potential is realised. It is a partnership between two people (Mentor and Mentee) normally working in a similar field or sharing similar experiences. It is a helpful relationship based upon mutual trust and respect.

A Mentor is a guide who can help the Mentee to find the right direction and who can help them to develop solutions to career issues. Mentors rely upon having had similar experiences to gain an empathy with the Mentee and an understanding of their issues. Mentoring provides the Mentee with an opportunity to think about career options and progress.

A Mentor should help the Mentee to believe in herself and boost her confidence. A Mentor should ask questions and challenge, while providing guidance and encouragement. Mentoring allows the Mentee to explore new ideas in confidence. It is a chance to look more closely at yourself, your issues, opportunities and what you want in life. Mentoring is about becoming more self-aware, taking responsibility for your life and directing your life in the direction you decide, rather than leaving it to chance.

This Mentoring scheme expects the Mentor to be more experienced than the Mentee to pass on specific advice and examples from their own experience. It is designed to provide Chapter members with access to a Mentor, an experienced professional who can help them improve their professional skills in the project, program and portfolio management disciplines, according to their needs stated on application.

There is currently no charge for mentees and mentors, this is volunteer work without remuneration other than the ability to claim PDUs. For mentors 12 PDUs can be claimed while a maximum of 6 PDUs can be claimed by mentees.

2 What Mentoring is and isn't

Mentoring should be:	Mentoring should not be:
<ul style="list-style-type: none">● An ongoing relationship for learning and development● Guiding someone towards their goals, as well as inspiring and supporting● Mutual sharing of experiences and opinions towards agreed outcomes● Flexible and at times even informal	<ul style="list-style-type: none">● An opportunity to correct someone's behaviours or actions● Directing someone to meet goals● Being the expert with all the answers● About trying to address personal issues

2.1 Timeframe

PMI Sweden Chapter recommends setting an expectation of the Mentoring relationship lasting a period of 6 months.

2.2 Level of formality

The Mentor and Mentee shape the nature of the relationship together. Some Mentoring partnerships are more informal, taking place as and when the Mentee needs advice, guidance and support. Other relationships are more structured where there are set times for meeting for a predetermined period of time. PMI Sweden Chapter recommends that there is a formal agreement about how the relationship will be structured, at the start of the relationship and both parties regularly review how well the relationship is working.

2.3 Relative levels of experience

The matching of Mentors and Mentees will aim to ensure the Mentor has more experience than the Mentee in the area of focus. However, there may be aspects where the Mentee has more experience.

2.4 Goals of the Program

The goals of the PMI Sweden Mentoring Program are to:

- Contribute to the individual growth of our Chapter members (both mentors and mentees).
- Allow Chapter members to develop their professional skills in project, program, and portfolio management.
- Provide Chapter members with the opportunity to build their networks and improve their networking and communication skills.
- Enhance the reputation of the PMI Sweden Chapter by providing a valuable service to its members.
- To help create a culture of learning within PMI Sweden.

The key performance indicators will be:

- Evaluation of the program and goals
- The number of successful pairings that reach 6 months ongoing relationship or the mentee's goal is satisfied
- Mentor and mentee satisfaction ratings as provided by the surveys at the end of each 6-month relationship
- The mentoring team and PMI Sweden Board's assessment of how well the pilot and ongoing program can be sustained

2.5 Benefits of Mentoring

There are benefits for all involved.

Following are some of the mentee benefits:

- Having someone independent to talk openly too
- Gain a wider perspective on one's career and immediate tasks
- Time to reflect and being supported in that reflection for opening up new ways of thinking
- Access to knowledge and experience
- It is also anticipated that mentees will improve in confidence to lead, to cope with difficult situations, and to resolve problems not just symptoms.

Following are some of the mentor benefits:

- Practice interpersonal skills
- Realizing one's own skills
- Satisfaction from contributing to the success of other
- It is also anticipated that there will be satisfaction from perpetuating the project management culture and also offer a personal learning opportunity, opening up additional ways of thinking
- Gaining more experience in Mentoring and in leadership skills.
- Learning to adjust one's knowledge to new situations, especially if the mentee is in another line of business.

Following are some of the benefits to PMI Sweden chapter:

- A service offering for members' development
- Member satisfaction
- An incentive for joining PMI Sweden Chapter
- Networking and knowledge sharing within our organization

It is also anticipated that members' organizations will benefit from the development of their employees: specifically, the general project manager skills of mentees and the leadership skills of mentors.

2.6 Mentoring Scope

The mentoring program is focused on the specific needs of PMI Sweden Chapter members, focusing on:

- Improving the skills of the mentee in various project management knowledge areas, through the sharing of experience and lessons learned by mentors.
- Support in specific situation handling: for example, team conflict, difficult customers or, stakeholders and any management related issues e.g. managing downwards or upwards

2.7 Mentoring Program Approach

The program proposes a six months mentoring assignment.

Prior to each intake cycle we will publicize the mentoring program, inform interested people on how to proceed and have an information event to give participants a good groundwork for the mentorship.

The training will cover how the mentoring program will operate, and provide mentors and mentees with guidance on best practices for mentoring.

2.8 The Mentoring Program Team

The mentoring team is based on volunteers' work. The volunteers make sure that the program is running smoothly throughout the whole period. Furthermore, they represent the direct contact in case of questions/issues arise during the program. We strongly encourage mentors and mentees to contact the team in case of problems or questions that might impair the smoothness of the program.

2.9 Our responsibilities

- The Mentoring team will be maintained until the Mentoring activity has closed.
- The Mentoring team is the first contact point for any issues arising with the programme.
- The effectiveness of the Mentoring Scheme will be regularly assessed. At the end of each 6-month cycle there will be a survey to collect quantitative and qualitative feedback in order to improve the Mentoring program.

3 Process



The key steps on the mentoring life cycle are:

1. **Register current members of the PMI Sweden Chapter can apply to the mentoring program.** Potential mentors and mentees submit formal applications to join the Mentoring Program. How depends on what process the team has chosen.
2. **Connect** – the Mentoring Team will facilitate the matching of the applicants, but leave the initiating and the matching to the participants. How this is done depends on what process the team has chosen.
3. **Engage**– mentor and mentee will continue to meet and work together on their mutual learning journey. If required, refine the goals of the mentoring relationship as necessary. Midway through the mentoring program they need to review their progress and satisfaction and update the mentoring team on their status.
4. **Close** – the end of the mentoring relationship. Ideally, the goals of the mentee and mentors have been achieved. Note that there will be circumstances under which some mentoring relationships terminate earlier and other cases where the relationship will keep on going despite the end of the program. In all cases, a final formal evaluation will be completed, including lessons learned, and sent to the mentoring team. How this will be done will be communicated out by the team at least 2 weeks before the mentorship ends.

4 Register

It's up to the mentoring team to choose the process for each year and the two processes available right now are.



4.1 Registration process

1. Each participant should go to the Mentorship Programs webpage to sign up for the next round (sign up opens usually around October).
2. Each participant will also have to update their profile on PMI-se.org with required information to facilitate a matching.
3. Mentoring tends to be more successful when the Mentor and Mentee profiles are well captured - please take the time to consider and write what is important to you.
4. Participants should search for other participants and reach out to initiate contact.
5. When a match is agreed upon an email need to be sent to mentorskap@pmi-se.org with name and email to both participants.

4.2 What makes a suitable Mentor

The Mentor's role is to provide support and guidance to Mentees, providing the Mentee with development opportunities based on agreed objectives.

- Should be a programme or project manager or similar, with management experience to share.
- Must be a current member of the PMI Sweden Chapter
- Should be a successful professional with the right attitude, willing to share knowledge with the Mentees.
- Please note that this is an unpaid, volunteering role.

4.3 What makes a suitable Mentee

The Mentee's role is to ensure that the scheme is used as an opportunity for personal development, based on agreed objectives. The most suitable Mentor required to achieve that goal is not necessarily someone more senior.

- Mentees have the duty to specify their expectations, needs and goals they want to achieve during the mentoring program. This will facilitate the mentors' role and will contribute to a successful mentor-mentee relationship

4.4 Behaviours

Mentors and Mentees must abide by the PMI Code of Conduct.

5 Connect Mentor and Mentee



5.1 Connect (matching) process

- The Matching is done by updating your profile at PMI-se.org with the information that you're looking for a Mentor or an Adept.
- Then in Contacts you can search for others who have done similar updates to their profiles, read about them and initiate contact.
- Once you have found one or several matches you send an email to mentorskap@pmi-se.org to get your matching registered in the program

It is recommended that the Mentors and Mentees think in advance of what they want out of the mentorship as well as what they bring into the mentorship. This will help finding a good match and set a common goal.

6 Engage

Mentor and Mentee will meet and work together on their mutual learning journey. If required, refine the goals of the Mentoring relationship as necessary. During the Mentoring program they need to review their progress, satisfaction and participate in the Mentor team's information gathering at midterm and at closing to update the team on the progress and to share lessons learned.



6.1 Responsibilities of the Mentor

- Send out meeting requests for the next session (or sessions if it helps to book these in advance) and include the agreed upon agenda for that meeting.
- Participate in the events Mentoring team organizes mentioned under 8.7.
- Send in required documents and evaluations mentioned under 8.7.
- To communicate with the Mentee, Mentor supervisor or Mentoring team, if at any time they feel that the relationship is running into trouble.
- Prior to each meeting with the mentee, the mentor is expected to work on the topic agreed for that meeting. The mentor has to prepare at every meeting to deliver knowledge and information that the mentee asked for.

6.2 Responsibilities of the Mentee

- To attend meetings as agreed with the Mentor
- Summarise the learnings that you have gained from the session and the actions agreed. Develop and agree on personal objectives.
- Ask for advices and information you would like the mentor to help you with during the next session (this will help to define expectations and will help the mentor to prepare)
- Participate in the events Mentoring team organizes mentioned under 8.7.
- Send in required documents and evaluations mentioned under 8.7.
- To communicate with the Mentor, Mentor supervisor or Mentoring team, if at any time they feel that the relationship is running into trouble
-

6.3 Mentoring Meeting Record

To build on the discussion and keep the relationship going, it is useful to agree in advance who will be responsible for record keeping and logistics. Mentors and Mentees are encouraged to discuss and agree on the level of formality they will apply to the record keeping for their Mentoring sessions and the following is a guide:

6.4 Support from the Mentoring Team

If all goes well, you should be able to structure and manage the regular sessions between the Mentor and Mentee without any help. However, if you need support, please contact us as we have experience in helping get the most out of mentoring and are here to help you.

7 Mentoring Close

Feedback Phase and the end of the Mentoring relationship.



A final formal evaluation should be completed, including lessons learned, and sent to the Mentoring team.

7.1 Responsibilities of the Mentor

- Be clear about the ending, if you expect to continue to talk to the Mentee that's great but ensure there is clarity about your expectations going forwards.
- If appropriate, provide feedback on your experience and areas of focus for the Mentee in the future.
- Update your details so that we know if you are looking for a new Mentee and, enlightened by the last experience, what you are looking for.
- Responsible for sending in a formal evaluation including lessons learned to the Mentoring team either by filling out a form the team has sent out or by mail and to participate at the closing event. See 8.7

7.2 Responsibilities of the Mentee

- Summarise the learnings that you have gained from the experience.
- Thank the Mentor for their time and, if it seems appropriate, give feedback on what they did well and what might have been done differently.
- Update your details so that we know if you are looking for a new Mentor and, enlightened by the last experience, what you are looking for.
- Responsible for sending in a formal evaluation including lessons learned to the Mentoring team either by filling out a form the team has sent out or by mail and to participate at the closing event. See 8.7

8 Hints and Tips for Success

8.1 Be organised

- Regular structured interaction takes place.
- Proper ambience must be ensured for conduct of the meetings.
- Mentors and Mentees are aware of their roles & responsibilities.
- The Mentee should keep notes on meetings and be prepared to review the notes prior to the next meeting. Set goals & actions. Review your action items. This is the starting point for the learning cycle
- Mentees should take the initiative to propose the agenda and discussion topics.
- Mentors must be willing to commit the time and energy to provide support for their Mentee. A clear understanding of the Mentoring process will go in a long way towards achieving success. Need to maintain honest and open communication to ensure positive outcomes.
- Initiate contact with the Mentee
- Meet at scheduled times
- Remember that there are multiple ways to reach goals. Support the Mentee to the best of the ability, but success or failure is the Mentee's responsibility
- Be aware of the goals of the Mentoring relationship. If it appears that the focus of the sessions is drifting away from the agreed goals, raise this with the Mentee and adjust the goals if needed.
- Challenge the Mentee to develop a plan of success and offer to provide feedback to improve the plan
- Help the Mentee create a foundation of resources and support, in addition to your Mentoring relationship
- Listen and consider alternatives

8.2 Manage the time

- Be committed and respect each other's time
- Mentees initiate contact after the initial meeting.
- Regular communication takes place between Mentor and Mentee.
- Both parties can commit sufficient time to Mentoring sessions.
- Make your commitments to your Mentee a top priority – avoid postponing or cancelling meetings
- Respect your Mentor's time
- Setting a time frame for the Mentoring relationship up front helps to know when to say goodbye and to transition from the Mentoring.
- Mentoring sessions are a valuable resource – resist the temptation to cancel sessions at the last minute.

3.

8.3 Develop Trust

- There is a strong trust relationship, where confidentiality is maintained.
- Mentor has no supervisory role with Mentee and no other conflict of interest.
- Mentor and Mentee can request reassignment without blame being assigned.
- The Mentor's role is to listen, ask probing questions and give constructive feedback. This is an action learning program for the Mentee, so while it is tempting to jump in and tell them what they should do, it is a far better learning experience for the Mentee if they can get there themselves.

- Maintain confidentiality. This will help the relationship to be honest and upfront.
- Encourage independence not dependence
- Establish rapport early and agree on goals, responsibilities, and expectations, to ensure the relationship gets off to a good start
- Consistently role model successful behaviours, or 'walk the talk', as Mentees learn just as much from your actions as from your advice
- Seek every opportunity to offer support, praise or encouragement, and unconditionally affirm your Mentee as a person of great value
- Actively listen, reflect feelings and clarify alternatives when the Mentee has concerns or difficulties
- Be honest in interactions and be fair in feedback.
- Don't ask Mentor to do the work for you.
- Notify your Mentor of your concerns, problems and questions

8.4 Make the best use of the opportunity

- The initial meeting is face to face (ideally). The pair can then decide on the best way to conduct subsequent Mentoring sessions.
- Mentors and Mentees have a similar background (or have a specific topic to discuss).
- Mentors are willing to stretch themselves to help the Mentees.
- Mentees should consider all ideas from their Mentor and together consider how appropriate they are for their situation
- The key to Mentoring comes back to good active listening skills. Be fully present, focusing on the Mentee and what they are saying
- Seek first to truly understand their situation before leaping in with ideas. Ask insightful, open ended questions that help the Mentee explore their situation
- Don't give advice unless asked
- Don't take responsibility for Mentee program or duties
- Don't allow the Mentee to become dependent on you
- Maintain a positive outlook – do not complain about your own problems
- Don't do the Mentee's work for them.
- Be a good listener
- Give constructive feedback
- Promote Mentee creativity and skill development
- Help Mentee to develop and set goals
- Maintain positive attitude
- Resist the temptation to solve the Mentee's problems and instead empower Mentees to be independent and help themselves when they encounter a problem
- Nurture creativity while tempering with reality and pragmatics and gently shed light on unrealistic expectations
- Set challenging assignments for your Mentee that are tailored to their abilities
- Assume personal responsibility for your professional growth
- Accept constructive feedback willingly
- Be willing to take risks and be open to new ideas
- Main positive attitude
- Demonstrate initiative
- Remember that there is more than one way to reach the goal
- Don't rely on the Mentor as the sole source of support or information
- Don't expect the Mentor to give answers to all your problems - think of Mentor as one suggesting alternatives

8.5 Definitions of mentoring

There is no guide in PMI's Body of Knowledge (PMBOK) about Mentoring. There are different understandings of what Mentoring involves and this programme uses information from a 2012 UK government funded "Get Mentoring" programme (<http://www.Mentorset.org.uk>), for its definition and expectations, as well as Ginger Levin's 2011's paper on 'Mentoring: A Key Competency for Program and Project Professionals.

"Mentoring is to support and encourage people to manage their own learning in order that they may maximise their potential, develop their skills, improve their performance and become the person they want to be." Eric Parsloe, the Oxford School of Coaching & Mentoring

"The People Capability Maturity Model defines it as 'The process of using experienced members of the organization to provide personal support and guidance to less experienced members of the staff' (Curtis, Hefley & Miller 1995 p17)" Levin (2011)

8.6 More information on Mentoring

Please visit our webpage at PMI-se on the following address for additional material:

<https://www.pmi-se.org/Kompetens-Projektledning/Mentorskap>

8.7 PDU's

Mentors can apply for PDUs in line with your credential. Please check the latest PDU Category Structure and Policies under 'Continuing Certification Requirements' (CCRS) on the pmi.org website. The following is extracted from current documentation (Feb2015): Category E: Volunteer Service for being a Mentor on project management topics, 1 PDU awarded for 1 hour of volunteer (not compensated) service.

The PDUs claimed in this category count against the maximum of 45 PDUs (for the PMP/PgMP credentials) or 20 PDUs (for the PMI-SP, PMI-RMP and PMI-ACP credentials) allowed for the "Giving Back to the Profession" categories (Categories D, E, and F).

Also, it is possible for Mentees to claim PDUs; this is under Category C PDUs for self-directed learning activities which are individualized learning events involving personally conducted research or study.

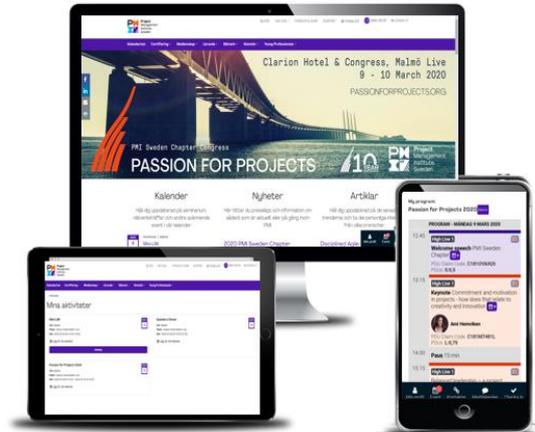
- **If you would like to claim PDUs, it is important that you:**
 - Participate in the information gathering at midterm.
 - Send in a document with the date and subject of each meeting with the Mentee. (But no details since we want your mentorship to be confidential between the participants.)
 - Send in a formal evaluation of the Mentorship at the end of the Mentoring, including lessons learned to the Mentoring team
 - Participate in the closing event at the end.

Appendix - PMI SE Web App Reference Guide

The PMI SE Web App

We have improved the PMI Sweden Web by adding even more member value to the web, tablet and mobile users.

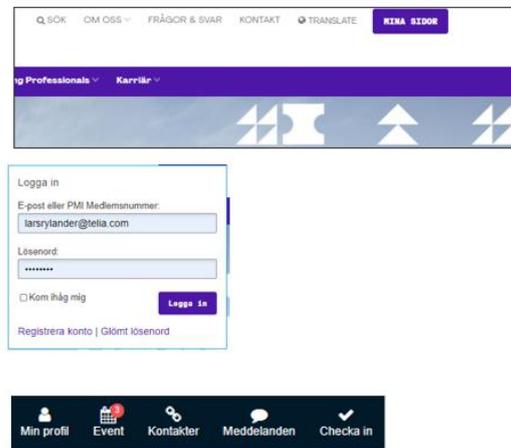
<https://www.pmi-se.org>



Logging in

Start by logging in to pmi-se.org

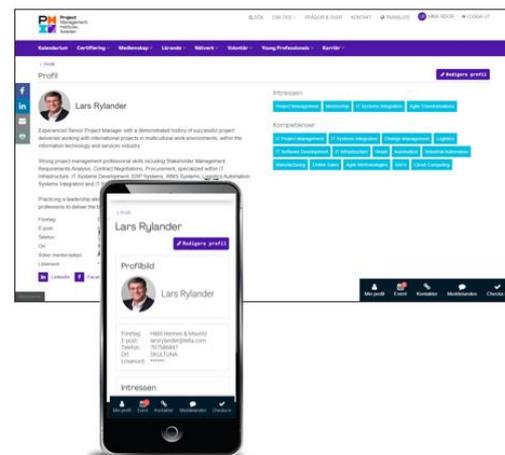
To log in click on “Mina sidor”
Enter your email address or PMI membership ID and password and click “Logga in”
When you have successfully logged in, you will see the shortcut menu at the bottom of the screen. Use this menu to navigate to the different functions described in this quick reference.



Updating your Profile

Start by updating you own profile

Start using the new functionality by updating your profile, adding contact information and selecting your preferences. Login is required.
Some basic information is inherited from pmi.org and cannot be changed. To updated that, you will need to do that in your profile on <https://www.pmi.org/>
Adding a photo will make your profile look better, more personal and make it easier to find you.
You may also choose what users will be able to see and connect to you.
Password may also be changed here.



Updating your Profile

- Profile presentation
 - You can now provide a short presentation of your self
- Link to your LinkedIn profile
 - If you want to share your LinkedIn profile, please add your public profile URL
- Link to your Facebook profile
 - If you want to share your Facebook profile, please add your public profile URL
- Web site link
 - If you want to share your web page, please add your web site URL
- Are you looking for a mentor or adept (or both)
 - Select from dropdown list
- Select whom to share the information with

Spara

Save when you are done!

Updating your Profile

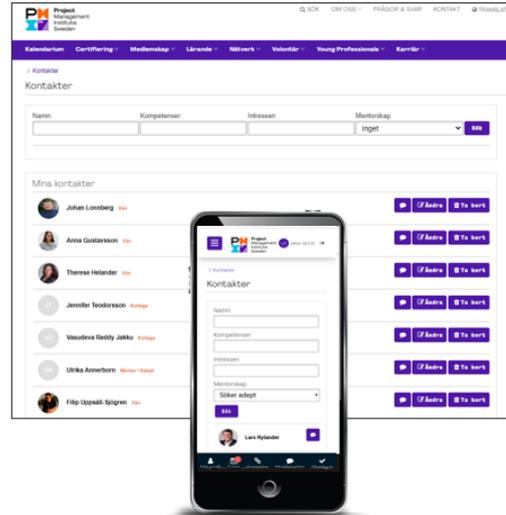
- Interests
 - Add interest that you would like to share in your profile
- Competences
 - Add competences that you would like to share in your profile
- Change password
 - Enter your current password
 - Enter your new password
 - Confirm your new password

Click to save your new password

Connections

Search and manage Connections

- You may search for other registered members and non-members.
- Provided that they have chosen to make themselves available for others. Depending on their settings you will be able to see photo and contact information. You can add and remove contacts here.
- You can search for the following:
 - Name
 - Competences
 - Interests
 - Mentorship: Looking for a mentor or mentee/adept



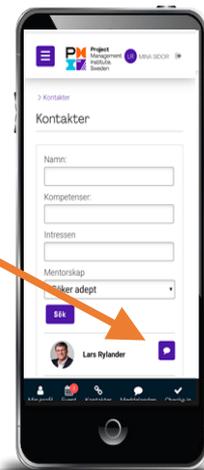
Messaging

Send messages from the search page

You may create and send messages directly from the search page. Click on the message button in the search result list to start a new conversation



This will bring up the messaging function.



Message and notifications

Keep in touch with Messaging

You may send and receive messages with your contacts. Messages is not an email function, but more similar to the messaging functionality on other social media platforms. It works similar on all device platforms, except for the interface being slightly more limited on your smartphone.

When a message is sent, an email notification will also be sent to the email address of the recipient.

