

#### **Case study 4 - Project Management/Business and soft skills mentoring**

Sarah, who works for a large technical organisation, had recently moved into a new role as Business Improvements Manager. Her main responsibilities required the skills of a project manager, for which Sarah had no previous experience or formal training. So, she approached me to mentor her to build her skills in project management techniques and tools to enable her to succeed in her new role.

We agreed on a three-month period of mentoring, during which we met on a monthly basis for half a day. These meetings were supported with fortnightly one-hour phone calls.

The key areas she wanted to cover were tools and techniques for time management, creating schedules, prioritisation, risk assessment, preparing for and facilitating meetings, templates for task lists and reports.

For the first session I asked her to bring her copy of her next month's schedule. We used this as the focus of our time management session, including assessing dependencies, which ensured that she was always prepared and had the necessary information for each meeting – a critical factor since she worked across two sites.

Another session concentrated on converting a task list into a structured issues log including techniques such as prioritisation, dependencies, risk assessment and impact analysis.

Although I provided various templates and tools, Sarah was encouraged to develop them into her own format and style. This is very important as it helps the person understand the reasoning behind the content and it becomes something he or she owns.

We then progressed to organising and holding meetings and covered the key areas of setting objectives, using them as a focus to identify who should attend and why, determining the meeting time frame and its scope. Another key aspect is how to communicate with invitees so that they see a common purpose in attending and bring something useful to the meetings.

In addition, we created generic probing questions around the project management approach of what, why, how, who and where, that Sarah could tailor to suit any context in a meeting. I created some role-play scenarios which allowed Sarah to practise her technique in adapting the generic questions to a specific situation.

We worked on other personal skills such as enhancing personal discipline and focus, developing assertiveness and managing boundaries.

Sarah is now confident that she can handle her new role more effectively by having the relevant tools at her disposal as well as practising the techniques and understanding how and when to use them. Through role-play with a mentor and by regular practise in business situations she has gained in personal confidence and has become more self assured.