[Client/Project Name] Mentorship Plan

Overview

Mentor:	[Name]
Mentee:	[Name]
Duration:	[Month/Year] - [Month/Year] (duration of project)
Project:	[Client Name]

Roles

- [Name] is the primary PM
- [Name] is [shadowing, pairing, or providing support in x areas]
- [Additional notes]

Areas of Focus

Primary

- [List primary areas of focus here—e.g., scope management & tracking, feature/functionality documentation, budget management and communication]

Secondary

- [List any secondary areas of focus here, if applicable. If not applicable, delete this section.]

Activities & Deliverables

- *Let's brainstorm specific deliverables, activities, meetings that [mentee name] would like more exposure to or support in as part of this project.*
- [List activities here]

Known Challenges

- *To brainstorm/discuss - what are the known challenges of the project?*
- [List challenges here]

Success Metrics

What would make this pairing a success for [Mentee Name]? Let's define the PM success metrics we'd like to point to at the end of this project.

- [Extract concrete success metrics from areas of focus above.]

Expectations

Time Tracking

- *[Notes on how mentor and mentee should track their time go here.]*

Client-Facing?

- [Notes on whether non-lead PM should be client-facing or not, and if so, how to position that person.]

Recommended Touchpoints

- [Mentor] and [Mentee] to hold initial ramp-up session(s) to get [Mentor] up to speed on the project and account.
- Include [Mentor] on all communication - feel free to BCC or forward if that feels more appropriate.
- [Mentor] and [Mentee] to hold [frequency] pairing sessions (adjust frequency as needed).
- [Additional notes on touchpoints]

Project Involvement

Recurring Meetings

Client Project Meetings

- [Name of meeting] - [Mentee/Mentor Name]: [Shadow, Participate, or Skip]

- [Name of meeting] - [Mentee/Mentor Name]: [Shadow, Participate, or Skip]

Internal Project Meetings

- [Name of meeting] - [Mentee/Mentor Name]: [Shadow, Participate, or Skip]

- [Name of meeting] - [Mentee/Mentor Name]: [Shadow, Participate, or Skip]

Key PM Tasks & Deliverables

Responsibility approach options:

- [Mentee], [Mentor] reviews
- Independent work, then pairing
- [Mentor] owns, [Mentee] reviews
- Shadow

Week of	Task	Responsibility Approach
xx/xx	[Task name]	[Pull in from responsibility approach options above]
xx/xx	[Task name]	[Pull in from responsibility approach options above]
xx/xx	[Task name]	[Pull in from responsibility approach options above]
xx/xx	[Task name]	[Pull in from responsibility approach options above]

Project Links

- [Add handy links / resources from the project here]

Next Steps

- [Mentor] & [Mentee] to schedule
  - [Pairing meetings for imminent activities]
  - [Additional touchpoints]
- [Manager or Mentor] to schedule midpoint checks:
  - [Timing / purpose]

Ongoing Notes

- [Mentor/mentee to use this section as needed for notes from pairing sessions, or retro-style reflections on how the mentorship pairing has gone and what we should consider adjusting along the way]