



PMI Mentoring  
and Development  
Programme

# Workbook



Pensions  
Management  
Institute

People's  
Partnership

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# Foreword

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**Welcome to the PMI Mentoring & Development Programme. We hope the programme helps you achieve your career goals and aspirations.**

Inside the workbook you will find more information about mentoring, followed by templates you can use to record your sessions. Here, you will be able to note down key aspects that are important to you, such as your goals and expectations, and the progress you are making towards them.

At the end of the workbook, you will also find a list of PMI Events which you may wish to attend.

We hope the templates provided in the workbook are useful in structuring your meetings and for keeping a record of the discussions and outcomes.



# What is Mentoring?

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Mentoring describes a relationship between two people that develops as a way of providing support in a work-related context.

A mentor could work for the same organisation as their mentee but not always; the key aspect of the relationship is experience.

The mentor usually has a level of experience (perhaps number of years or in a particular skill) that the mentee does not have but feels they want to develop. In this way, mentoring is a mixture of advising, training, teaching, supporting, and coaching.



## What is Mentoring? (Cont)

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### How does it work?

Mentors and mentees decide between themselves how they wish to work together. You can meet face to face or have the sessions via telephone calls especially if you live or work far from one another. How often you talk is discussed in advance: Will it be a once a month chat or ad hoc when a question arises? To successfully meet the PMI's programme requirements, mentees and mentors must have a minimum of six meetings throughout the year.

It's important that both of you are happy with the level of input and effort required to maintain the mentoring relationship. The best mentoring relationships happen with pairs working in different companies to provide an objective viewpoint. A mentor working a level above the mentee, for example, can also provide skills that the mentee doesn't already have. A mentor that has the job level or is working in a sector that the mentee would like to move into can help the mentee to get promoted or be hired for another role.



# Information for Mentees

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## Selecting the right mentor

Choosing a mentor that has the right skills and experience is important . You should think about whether you want a mentor that can help with short term challenges or longer-term career development. Or both!

Should your selected mentor not be suitable, please contact the PMI Membership Department at [membership@pensions-pmi.org.uk](mailto:membership@pensions-pmi.org.uk) to arrange a better match.



## Information for Mentees (Cont)

### Notes for Mentees

#### 1) Initiate

Take the initiative to ask your mentor a question, to let him or her know your educational and professional interest and objectives, and ask about his/her own experiences.

#### 2) Honour your commitment

Your mentor probably has a very demanding job. He or she has volunteered to take on the added responsibilities of mentoring. Please be appreciative of your mentor's time and investment. Respond in a timely manner to your mentors questions and comments.

#### 3) Help your mentor help you

Tell your mentor how they can be most helpful to you

#### 4) Expect support, not miracles

You can expect a certain level of support and advice from a mentor, but he or she can't solve your problems for you. Perhaps the most valuable quality a mentor can offer is an alternative point of view. A mentor can put the situation in perspective, offer feedback, serve as a sounding board, and identify others whose brain you might pick or activities you can engage in or small ways you can position your work to meet your goals as well as resources that may be helpful to you.

#### 5) Communicate clearly

Initiate contact with your mentor if you have questions or would like to discuss something. Identify your needs and communicate them as clearly as possible to your mentor. It may be helpful to put some focused energy into organising your thoughts and concerns before talking to your mentor, so that the time is spent wisely.

#### 6) Be teachable

Be willing to learn new things, obtain another perspective, and be responsive to suggestions and constructive criticism

#### 7) Keep up your end

Work hard at being a good mentee

#### 8) Follow through

When you decide to act on your mentor's suggestions, act in a timely manner and then report back to them

## Information for Mentees (Cont)

### Notes for Mentees

#### 9) Look ahead at your calendar

Are there any days you know that you'll be very busy? If so let your mentor know you will not be able to respond/engage for a while.

#### 10) Correct misunderstandings when they happen

Get in touch with your mentor before a concern becomes a problem

#### 11) Drive the relationship

You should drive the relationship. Oftentimes, mentees and mentors believe that a mentor, who is often in a better position to do this. You should set goals to review with your mentors, agree on the amount of time you can invest, and suggest how you would like to work with your mentors. Driving the relationship may be uncomfortable at first but doing so will keep the focus on the your needs.

#### 12) Be courageous

An effective mentee is a courageous mentee. You should ask questions even if the answers may seem obvious. You should make it clear through words and actions that your mentors can openly give you feedback—even if it is critical. You should understand that setbacks are learning experiences.

#### 13) Be clear about the ask

Mentees who grow the most as a result of the mentorship experience are often the clearest on what they want and need from it. You should be specific about your goals and articulate how your mentor can help.

#### 14) View feedback as a gift

You should assume your mentors has the best intentions and recognize that their feedback is also a gift. If you struggle to accept feedback from your mentor you may find it helpful to talk with them about how you would like to receive feedback. This may help your mentor to grow as well.



## Information for Mentees (Cont)

### Notes for Mentees

#### 15) Provide value

You should recognise your capacity to provide value to your mentor and identify opportunities to provide value by learning about your mentors' interests and connecting the dots. This could mean sending your mentor an article based on a discussion, attending a speaking engagement, or just listening when your mentor may require this.

#### 16) Be prepared

Each time you meet with their mentor you should have a plan. You should always arrive with an agenda and questions to ensure your meeting is productive and be willing to adjust as needed.

#### 17) Show gratitude

Giving thanks is always welcomed. Your mentor is sharing their time, knowledge, and resources in an effort to help you advance. You should express gratitude and provide specific feedback about how they have impacted you professionally.



# Information for Mentors

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**You should be aware of the objectives and goals your mentee has set and take the time to consider whether you are a good fit and can help your mentee in achieving these.**

## **The mentor's role**

As a mentor, you can fulfil a variety of different roles: a coach, a counsellor, a facilitator of networking opportunities, or simply a sounding board.

Mentors will generally need to:

- make themselves available to provide advice and support either face-to-face,
- by email or over the phone attend meetings at mutually agreed times
- offer advice in setting specific and measurable objectives
- offer guidance on the production of a PDP
- offer advice, where appropriate, on the final written submission
- guide the mentee towards becoming more critically reflective of their
- own practice and progress and
- give the mentee support and advice on professional matters

Confidentiality is central to the mentoring process, open discussions will strengthen the relationship and lead to better outcomes.

## Information for Mentors (Cont)

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### Characteristics of a good mentor

You should be:

- committed to the mentoring process, with a strong belief in its benefits.
- confident of your own knowledge, and able to share this knowledge where appropriate.
- able to give timely, honest feedback in a positive and constructive way
- able to offer guidance and advice, without instructing or directing
- able to listen patiently
- compassionate and understanding of the needs of your mentee
- encouraging and optimistic
- able to inspire confidence and trust
- able to provide an entirely confidential relationship

You will feel invested in the success of your mentee. As a mentor you will be knowledgeable, compassionate, and good at active listening.

### What kind of support can a mentor provide?

Each mentoring relationship will be different, but the types of support you can provide, and the types of questions your mentee might ask, can usually be divided into two areas:

#### Pension Related Questions

Many pension or work-specific questions will be dealt with by your mentee's line manager or other colleagues. However, sometimes a fresh perspective on a particular issue can be helpful. This is often the case if you and your mentee work in different disciplines. You will both be guided by the PMI's Code of Professional Conduct in relation to confidentiality during these discussions:

You can download a copy of the PMI's Code of Professional Conduct from the PMI website: <https://www.pensions-pmi.org.uk/about/governance/>.

#### General Career-Related Questions

Many mentees will be giving some thought to how they want to progress their career, and you will be able to provide help with this by giving insight into other areas of planning; recommending avenues to pursue; or maybe even facilitating introductions. Again, this will be guided by your own personal career history and experiences.

Any advice or guidance you can offer in this area will be shaped by your professional career, experience, and influences.

## Information for Mentors (Cont)

### Notes for Mentors

#### 1) Act as a sounding board

It can be very tempting for you to jump in and offer advice before your mentee has actually asked for it, especially when you have dealt with a similar situation yourself. You should act as a sounding board for your mentee, allowing them to discuss the situation, then helping to think through the situation by asking questions to draw out the consequences of various actions is always more empowering for a mentee than advising them what to do. It helps them work through the issue and come to their own conclusions. By doing so, you ultimately help them to learn to think through issues and trust their own judgement. Some of you will be familiar with this as a coaching style approach.

#### 2) Provide helpful feedback

Not all feedback is helpful. You should deliver feedback in a way that will help your mentee gain insight to further develop specific qualities or skills. For example, you will always ask for permission to give feedback before doing so. Giving unwelcome feedback can be detrimental to any mentoring relationship. Instead, you should explain what you would like to talk about first and highlight the benefits of doing this.

#### 3) Provide a fresh perspective

One of the benefits of working as a mentor is that a good one will often provide fresh perspective on an issue. You will often have the clarity of distance from an issue or problem that's needed to provide objective feedback. You can also hold up a 'mirror' to your mentee to, for example, let the mentee see what their behaviour looks like to others. Highlight for your mentee any achievements they might have forgotten to help build their confidence.

#### 4) Listen actively

You should fully concentrate on what your mentee is saying. You should understand, respond and remember what your mentee says. Taking notes during meetings and conversations with your mentee can help with this.

## Information for Mentors (Cont)

### Notes for Mentors

#### 5) Ask open questions

You should ask your mentee open questions to help you identify their real needs, values, and passions. It's also a great way to get your mentee to think through situations themselves and draw out the consequences of the various choices or courses of action they can take. During these conversations, you can share your wisdom, without making decisions for your mentee.

You should be conscious of not acting as an instructor. You are not there to tell your mentee what to do but may certainly make suggestions of how they might improve, which they are free to follow or to reject. If your mentee resists a suggestion try to understand their point of view and be sensitive to their concerns. Is there an alternative to the original suggestion?

Your mentoring experience should be enjoyable. Allowing you to use and develop your listening and coaching skills. This allows you to build a constructive relationship; one that might lead you to revisit your own career plans and professional development and makes you feel good about what you have contributed to an individual's professional development and to the future of the pension profession.



## Guidance for Mentees and Mentors

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**To help you get the most from your mentoring programme, here are some important points for your consideration:**

### 1. Attending the meetings as scheduled

All mentoring pairs face this challenge. Both of you have commitments and responsibilities, which can serve as convenient excuses for postponing a mentoring meeting. However, you must also remember your commitment to the program and to each other. Failing to meet as scheduled, or frequent postponements, will quickly erode the foundation of your relationship.

#### Strategies for overcoming this challenge

Block out the time in your calendar and schedule meetings a few weeks out at the very least. From a mental perspective, treat the meetings as you would any workplace meeting. Don't think of it as an extracurricular activity. And if you're still struggling after trying these strategies let the PMI Membership Team know you are struggling to meet. As an objective third party, we can hold you and your mentee/mentor accountable.

### 2. Managing your time and energy commitments

This is the flipside of the scheduling challenge. In this case, either one of you may want to meet more often than this programme requires. This would most likely happen at the beginning of the relationship, though maintaining such a frequent meeting schedule may prove difficult over time. In this 12-month programme, you will be expected to meet at least once a month, either virtually or face-to-face. Anything over this amount should be mutually agreed.

#### Strategies for overcoming this challenge

Adhere to the program guidelines and recommended meeting schedule from the outset—they exist for a reason!

## Guidance for Mentees and Mentors (Cont)

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### 3. Having unrealistic expectations

Expecting or assuming too much from the programme, or each other, can wreak havoc on a mentoring relationship. Overloading a mentee with information is an example of unrealistic expectations that can have a negative impact on the relationship. Conversely, the mentee may expect the mentor to provide more support and direction than is reasonable under the circumstances.

#### Strategies for overcoming this challenge

Set mentoring objectives and goals at the outset, ideally during the first one to two meetings. This way, everyone agrees regarding expectations. And again, when in doubt or if you're encountering resistance or resentment on the other side, consult the PMI membership team.

### 4. Avoiding over-dependence

Occasionally, a mentee may come to rely on the mentor for emotional support. The mentor may also expect their mentee to accept everything they have to offer instead of letting the mentee find their own path. Likewise, a mentee may rely too heavily on the mentor's approval. Rather than moving toward independence, the mentee might check in with the mentor before making decisions out of fear of making a mistake or receiving criticism.

#### Strategies for overcoming this challenge

Mentors must remind themselves that the relationship is about supporting the mentee. Mentees need to remind themselves that they need to make their own decisions and remember that their mentors are a source of support and feedback.

## Guidance for Mentees and Mentors (Cont)

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### 5. Changing an ineffective pairing

Although mentoring partnerships are carefully considered, it is possible a pairing may not work out for a variety of reasons: lack of commitment on the part of one of the parties, learning styles don't match, a change in job assignments, and, sometimes you just don't work well together.

#### Strategies for overcoming this challenge

If faced with this situation, one or both parties should speak to the PMI Membership Team as soon as possible. The PMI Membership Team might be able to help the pair reconnect or find their way. But if it's agreed that you both can't make this work, you can officially end the programme and we can put you on the list for next years where you will be matched with someone else.

### 6. Maintaining your commitment level

As mentors and mentees, it's important to remember that mentoring is for your personal development, rather than being just another work task. However, you may find that your enthusiasm for the programme may fluctuate.

#### Strategies for overcoming this challenge

If you feel your commitment waning, firstly try to find the reason. Are you stressed from work and having trouble keeping up with the sessions or goals? Are you struggling to contribute in the sessions? Are there feelings of worry or embarrassment? Are you not getting what you expected from the relationship? Just like any relationship, these feelings can be alleviated by communication. Once you've identified the cause of your lack of commitment, raise this in your next session, and try to work through the issues together.



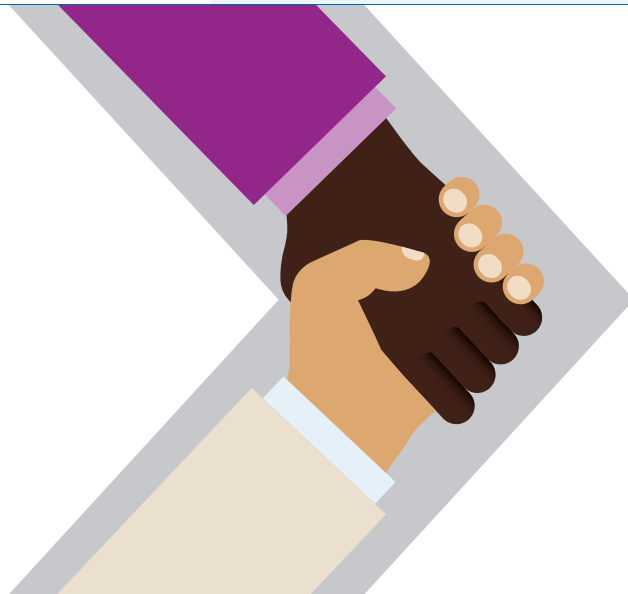
# Action Plan

## Mentee Details

Mentee Name	
Organisation / Department	
Job Title	
Email	
Phone	

## Mentor Details

Mentor Name	
Organisation / Department	
Job Title	
Email	
Phone	



## Developmental goals

1	
2	
3	
4	

# Meeting Notes

Date of meeting

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Expected outcomes from the PMI Mentoring & Development programme:

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To be set at the beginning of the programme and continuously referred back to.

**Examples:** 1) Build my confidence, 2) understand more about the general pension landscape, 3) Develop my leadership skills, 4) Work towards the next step in my career, 5) Grow my presence in the pensions industry

How do you feel you have progressed since the last session?  
Update on the previously set 'Actions'

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How many ILM modules have you completed?

---

Do you want to discuss any ILM modules in more detail (if any)?

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Actions from this session

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# PMI Ticketed Events

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## Introduction to Pensions 1

24-25 April 2023

**Basic** - designed specifically for those with little or no previous pension knowledge



## Introduction to Pensions 2

26-27 April 2023

**Advanced** - suitable for those who have some understanding of pensions but need to improve their knowledge



## Pensions Aspects Live 2023

21 June 2023

The event complements our members' magazine and draws on current issues and challenges facing the industry



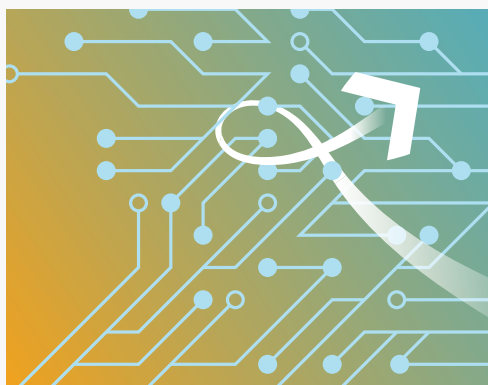
## PMI Pinnacle Awards

23 November 2023

Join us for a night of celebration at The Londoner Hotel, on 23 November 2023, as we showcase the height of pensions excellence

# PMI Free Events

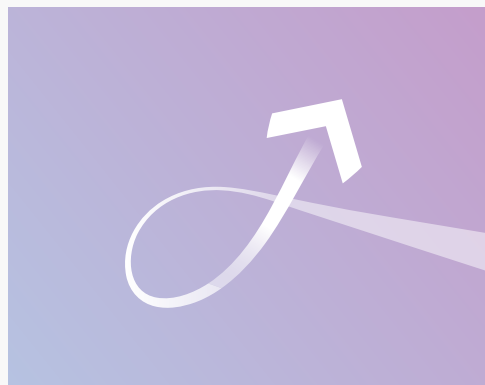
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## **PensTech & Admin Summit 2023**

04 October 2023

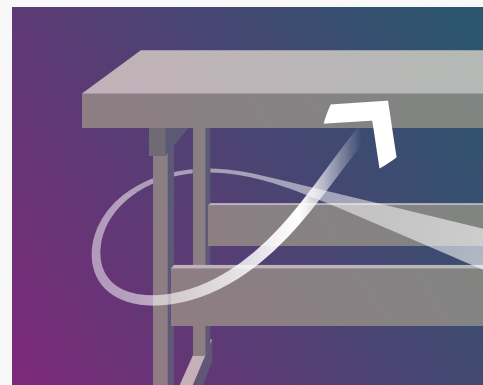
Keep up-to-date with the latest best practices and trends and find solutions to some of the industry's most challenging issues.



## **Annual Lecture**

2023

We will be holding our ninth PMI Lecture



## **Trustee Workbench**

02 November 2023

This event builds on our expertise in helping trustees succeed in their roles and draws on the current issues and challenges



## **ESG and Climate Summit 2023**

07 December 2023

The insight and knowledge shared by our top ESG speakers will highlight the latest developments in this topical and fast-moving area



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