

Mentoring Workbook

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1 Mentoring



The word 'mentor' originally comes from Greek mythology. Odysseus, King of Ithaca set out to fight the Trojan War and entrusted his son Telemachus to the care and direction of his old and trusted friend Mentor. This led to the word 'mentor' being used for someone who is a trusted friend and advisor.

Since then there are many definitions of a mentor but in keeping with the original use of a mentor the person could be described as a 'wise and trusted professional friend who is suitably experienced and acts as a confidential colleague and a guide.

In the business world mentoring is regarded as a relationship in which one person (the mentor) - usually someone more experienced, often more senior in an organisation - helps another (the learner or mentee) to discover more about themselves, their potential and their capability.

Mentoring is also concerned with creating an informal environment in which one person can feel encouraged to discuss their needs and circumstances openly and in confidence with another person who is in a position to be of positive help to them.

Mentoring can be the best intervention in areas where the development task relates to an employee requiring much specialist, knowledge and information. However there are other contexts where it is the best intervention.

Specific areas where mentoring can be used:

Context	Purpose
Induction	Helps people get up to speed
Support for development	Ensures effective learning
Career progression	Assist in identifying and supporting potential talent
On the job learning	To enhance job related knowledge and skills for the present
Equal opportunity programmes	To ensure proper integration and fairness of treatment
Redundancy and outplacement	To assist individual in managing the difficult transition
New projects	Help rapid assimilation and delivery
New job transition	Helps employee adjust
Within change programmes	To help people adjust to change

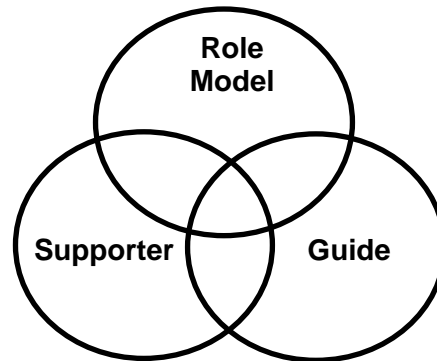
The mentor's role is not one of outlining instructions; rather the mentor's input helps the learner form their own views, develop different perspectives and develop as a person and as a potential manager.

Mentoring should be part of every manager's role but conflict may occur with some on-line functions, hence a mentor should not be their line manager.

3 The Mentor

3.1 The Role of a Mentor

A mentor's role can be divided into three main interlinking areas:



Role Model and Sounding Board

- Provides a good example, from which someone else can learn
- Guide to the company's culture
- Listens and empathises to mentee's concerns and problems
- Seeks options for the mentee to consider
- Critical friend – tells them uncomfortable truths that only a true friend can.

Supporter

- Assists with company knowledge and business information
- Encourages the use of resources and contacts
- Encourages mentee to find challenging tasks and supports with risk-taking
- Give support as s/he learns by sometimes making mistakes
- Recognises achievements and celebrates accomplishments.

Guide

- Guides toward solutions
- Helps to see issues from a different perspective
- Help to develop the connections they need to gain experience
- Shares views on succeeding at the company
- Identifies their leadership style and attitudes and behaviours that are not helpful
- Increases mentee's awareness on the affect s/he has on others.

3.2 Mentor Qualifications

Exercise 2 – Effective mentors share a number of characteristics. While any single mentor may not possess all of the characteristics, effective mentors have many of these qualities.

Which of the characteristics do you possess?

Tick the box for those that apply to you now:

	Have relevant professional and academic qualifications and experience commensurate with the person they are to mentor
	Has worked at the company long enough to know the company's culture and contacts
	Displays good representation of the organisation's values and principles
	At least one grade above the mentee
	Volunteer or nominated by their manager
	Potential time available for mentoring
	Clearly and regularly demonstrate our leadership competencies
	Work demonstrates solid achievement
	Exhibit a good feeling about your own accomplishments and about the profession
	Use a variety of techniques and skills to achieve your goals
	Enjoy and are enthusiastic about your work
	Considered by peers to display a high standard of expertise in your field
	Display a high standard of listening, questioning and feedback skills
	Recognize excellence in others and encourage it
	Committed to supporting and interacting with colleagues
	Exercise good judgement in decisions concerning yourself and the welfare of others
	Enjoy intellectual engagement and like to help others
	Able to role-play others and understand their views
	Sensitive to the needs of others and generally recognize when others require support, direct assistance, or independence

4 Potential Benefits of Mentoring

As a development process, mentoring has advantages for the mentor, the learner and the organisation.

Exercise 3 – List what you believe are the benefits of mentoring to the following:

4.1 Benefits to the Mentor

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4.2 Benefits to the Mentee

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4.3 Benefits to the company

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4.6 Mentor versus Coach

Coaching is primarily about performance and the development of specific skills. Mentoring is much more broadly based and intuitive, focusing on developing capability and often includes longer term help in career self-management.

However there are many similarities between a mentor and a coach. Both should use effective coaching skills by asking probing questions, challenging the person's thinking and exploring alternative perspectives.

Some of the major differences between a mentor and coach are outlined below.

Mentor	Coach
A confidential colleague and guide to discover more about the organization, their potential and capability.	A person who supports people to achieve their goals by goal setting, encouragement and questions.
The focus is on career and personal development.	Focus generally on development/issues at work.
Performance criteria set by the learner.	Performance criteria may be set by a third party, by the helper or jointly with the helper.
A senior person in the organization who knows the organisation, structure, and policies of the organization.	Often a specialist in the skills area who could be a consultant from outside the organization.

4.7 Mentoring and Counselling

A mentor is not a therapist or social worker and cannot provide professional counselling. On the other hand, mentors may sometimes find themselves providing informal counselling to mentees. Here are some tips to help you be helpful in such situations:

- Use your listening skills. Ask exploratory questions, listen thoughtfully to the full answer, and encourage the mentee to explore their own thoughts and feelings. If you give them a good opportunity to talk it through, they may gain insight and feel like they have made progress without your having to tell them what to do.
- Ask them how they feel. This is the stereotypical therapist's question, but it really can be helpful, try it!
- Try not to judge. Stay open minded as you help them explore their situation and think about their options. If you think some alternatives are wrong, ask them what they think about the practicality or morality of these alternatives. It is often more effective to challenge them to think about it, than to tell them what to think.
- Ask questions that encourage them to think more deeply and fully about their problems or concerns. For example, ask them if they can think of more alternatives.
- Help them find information or other resources that might be useful in resolving their problem or achieving their objective.

- Get them to come up with their own solution before you offer yours. Often, mentees will work through a problem with a little encouragement and coaching. When you guide them through the problem solving process, they learn a valuable lesson in self-sufficiency. It is not a good idea to let the mentee become overly dependent on you.
- If a problem seems too big for you and the mentee to solve, guide them toward appropriate professional advice or services.

5 The Mentee

Mentees are usually employees who wish to expand their current knowledge of the company and to develop skills and abilities that will assist them in their career development. **It is the mentee who drives the relationship – schedules the meeting, establishes goals and sets the agenda of each meeting.**

5.1 Mentee Qualifications

- These will vary according to the company's policy but generally they are:
- Any member of staff identified by the company's mentoring policy
- Volunteered (or nominated by line management)
- Willing to assume responsibility for their own growth and development
- Actively seeks challenging assignments and greater responsibilities
- Is receptive to feedback.

5.2 The Role of the Mentee

- Identify developmental needs
- To set goals
- Formulate action plans for accomplishing goals
- Maintain development plan and documents results
- Schedules meetings with their mentor
- Works on their development plan and meet regularly with their mentor
- Maintain regular work responsibilities
- Demonstrate a willingness to ask for help
- Respect mentor's experiences
- Emulate positive behaviours.

6 Duration of Mentoring

There are contradictory views on the duration of mentor relationships/benefit. Two to five years being postulated as the period of maximum benefit. It may well be that the period is less than this or the relationship continues longer on an informal basis. Company policy should state the duration.

It is usually considered best practice to set an expected end date for the relationship, to provide some sense of pace.

Remember that the aim of the mentor is to help the learner develop themselves - not to get them to adopt the mentor's ideas. Dependency is at all stages to be avoided - watch out for signs that it is happening.

Identify short and long-term issues which need thought and consideration and discuss ways and means of tackling them.

6.1 More than one mentee at a time

It is possible to have more than one mentee at a time but it is best to start with one or at most two, while you develop your skills in the role. It is very difficult to maintain the quality of relationship, if you have lots of mentees, unless you are a professional mentor.

6.2 End of the relationship

Mentoring relationships between people outside work may exist for years, as an on-going process; however, it is important to recognise that, in work, there is likely to be a point when mentoring ends - when the objectives are achieved. When this point is reached, summarise the progress made and agree to end the mentoring.

7 The Do's and Don'ts of Mentoring

7.1 DO:

- **Listen** carefully to what your mentee says
- Ask good **open** questions
- Be **honest** with your mentee
- Be **open** with your mentee
- Show your mentee that you are **interested** in what they are telling you
- Be a good **role model**
- Set aside sufficient time for meetings in your diary and **prioritise** it
- Be **on time** for meetings
- Help your mentee with **problem solving** by guiding them through a logical thought process
- **Set targets** for your mentee and work towards them together

- Show that you **recognise the challenges** within your mentee's job
- Strive for **mutual respect** - tolerate different views that you may have
- Keep what is said between you and your mentee **confidential**.

7.2 DON'T:

- Think that you are going to change the world overnight
- Try to solve all the mentee's problems at one meeting
- Promise what you are unable to deliver
- Postpone or cancel meetings unless absolutely necessary
- Jump to conclusions or simply give answers
- Be judgemental
- Talk too much and don't be dictatorial – Remember the 80/20 rule – the mentee should do 80% of the talking
- Forget how important you are to your mentee
- Don't stray into management – stick to your mentoring role
- Try to inflict your beliefs on a mentee
- Bottle up your own feelings - find your own mentor to talk them through with
- Maintain confidentiality and don't talk to others without the mentee's consent.

7.3 Mentoring is not a place to:

- Complain or spread gossip
- Dread going to
- Be told exactly what to do
- Waste time
- Be given specific answers to problems
- Find easy options
- Forget that learning is an active and continual process
- Be managed directly
- Ignore those things that need to be changed and done differently
- Expect answers to everything
- Have only a cosy chat that achieves nothing
- Receive counselling or therapy.

8 Mentoring Outcomes

8.1 Mentoring Skills

Mentoring is essentially a practical exercise and you will find that your skill as a mentor will get better with practice. No two situations are identical and what works within one relationship will not necessarily work for another. There are very few instances when you can apply a standard answer to any particular problem, and thus there are no right or wrong solutions you will be able to apply universally. Nevertheless, there are certain good practices that will help you to tackle the role in a positive manner. Likewise, there are several bad practices to be avoided.

No matter how much you work at the mentoring process there will often be times when conflict will arise with third parties who also have a relationship with your mentee. For you to be successful you will have to learn how to deal with these external relationships. Both you and your mentee will have to understand the roles of these other people and you will need to be able to deal with any circumstances that arise without breaking the rules of confidentiality or having an adverse effect on a situation.

Exercise 6 – Mark the Following with A for Always; S for Sometimes and N for Never depending on whether you believe they should be used in mentoring.

- Listening with empathy
- Discipline
- Sharing experience and learning
- Providing help and support
- Opening doors!
- Developing insight through reflection
- Performance management
- Being a sounding board
- Supervision
- Professional friend
- Using coaching behaviours
- Challenging
- Assessment for a third party

9 Phases of Mentoring Relationships

There are generally five phases of mentoring relationships. These are:

1. Rapport Building
2. Direction Setting
3. Progress Making
4. Winding Up
5. Close Down

The learning intensity peaks as the relationship evolves and tails off as it starts to wind down.

9.1 Meeting Suggestions

- The mentoring should take place where mentor and mentee both feel able to relax, yet be business-like in their discussions. The mentor's office is usually not a good idea, especially if the mentor is significantly more senior. It can be even more threatening to meet in the mentee's working area. In general, a neutral, private space is usually best
- The mentoring session should last between one and two hours
- The sessions should be at least once a quarter, with telephone or e-mail contact in between. If you meet very frequently, the mentor is likely to become too hands on, or to feel imposed upon. Use common sense to agree at the start a balance that suits the two of you, but be prepared to review that agreement if there is a radical change of circumstances.

9.2 The First Meeting

It is important to get acquainted and build rapport with your mentee at the beginning of the first meeting.

It will be useful to know something about your mentee before you meet them. When arranging the first meeting give the mentee a résumé such as that shown in Appendix B to complete.

Now is also a good time to think about what you will tell the mentee about yourself.

Exercise 9 Please make a note of the areas that you should tell your mentee about yourself.

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Recognise that in the early stages, the mentor will take more of a lead; later, as the learner's confidence and understanding grows, the balance will shift.

Ensure that the mentee is clear on what the relationship is about; this avoids any later confusion and disappointment.

There is no prescribed format to establish mentoring agreements, but consider drafting a mentoring agreement so that both of parties are clear about what is required of each of you.

This could specify:

- the respective roles, responsibilities and commitment
- the likely number and frequency of meetings, as a plan that can be reviewed and amended if required
- the important issue of confidentiality within the relationship.

In general, everything said in the mentoring discussions is private to the mentor and mentee. However, you have certain legal obligations to report criminal conduct, for example, and many organisations insist that the mentor has a duty to report any possible incidents of sexual harassment or bullying, which they hear about through the mentoring discussions.

Example of a Mentoring Agreement - Appendix C

Besides finding out more about each other, some areas you may wish to discuss are:

- The role of the mentor and mentee
- What would you both like to achieve from the relationship and what will the relationship involve e.g. work shadowing, attachments, discussion of different situations etc. You need to be clear about what you can and what you can't offer
- How frequently you should meet and for how long

- How will the time be used
- When the relationship should end
- Both the mentor and the mentee can agree to terminate the mentoring relationship if either believes that the mentoring is not working as it is intended
- You should also try to arrange your next meeting and the location.

Mentee Development Plan - Appendix D

Now is the time to discuss with the mentee an action plan for their development. Use the development plan at Appendix D and ensure they understand SMART Action Plans.

Learning Log - Appendix E

Discuss with the mentee the benefit of the Experiential Learning Cycle. Issue them with copies of the learning log for them to complete after they have had an event or experience which they can learn from.

9.3 Between First and Second Meetings

- Mentee completes Mentee Development Plan at Appendix D
- Mentee completes Learning Log(s) at Appendix E
- Mentor completes the Mentor's Planning Sheet at Appendix F
- Mentor or mentee (or both) complete the Meeting Planner at Appendix G
- Mentee prepares the agenda for the next meeting

9.4 The Second Meeting

- Review the Mentee Development plan
- Set SMART objectives for what the mentoring process is to achieve and give copies of the SMART Action Plan (Appendix H) for the mentee to complete
- Identify any obstacles to achieving it.

Identify jointly what needs to be explored in order to achieve each objective; compare the desired outcome with what exists now, identify the gaps and outline what needs to happen to bridge them.

If the objective is knowledge-based, or attitudinal, the action needed may be harder to identify and pin down; explore possible options, discuss experiences and always leave the learner able to decide on what they will do for themselves.

If the objective is skill-based, break down the required action into milestones - small and self-contained "chunks" - so that each can be tackled as a manageable entity; this builds in opportunities for regular progress reviews, and for success to be recognised and celebrated.

Select and agree appropriate action to achieve the objectives, whether it is learning experiences that can be provided or facilitated by the mentor, knowledge that can be passed from mentor to learner, or an increase in the self-awareness of the learner through counselling and feedback.

At the end of each mentoring session, clarify what has been achieved, and be precise about what will happen between this session and the next - especially if the mentor is to arrange something on the learner's behalf. Ensure control of the learner's development passes increasingly from the mentor to the learner; this is essential as it leaves the learner able to stand alone when the mentoring process ends.

9.5 Reviewing the Mentoring Progress

It is useful to periodically check to see if the mentoring is meeting the needs of the mentee and review the mentoring relationship.

The timing of the review will depend on the frequency of the meetings. As an example, if the mentoring meetings are held every month, then the first review could take place after three months. See Appendix I.

9.6 Evaluating the Mentoring

When the mentoring has finished it is important to review the effectiveness of the mentoring for the mentee and the mentor. Please see some examples of the form that can be used at Appendix J and K.

10 Case Studies - Possible Issues for a Mentor

Exercise 10 – Record your answers to the following possible situations

- 1. At your last meeting you agreed some actions for the mentee but their manager gave her no time or resources to complete those actions.

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- 2. What can you do to avoid the mentee's line manager becoming negative about mentoring?

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14. Your mentee tells you they feel intimidated by Brian a colleague who is well known for the jokes he tells and pranks and he plays on people. Brian has made comments like "You're quite bright for a Paddy aren't you!"

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15. Your mentee spoke to a senior manager about the way they were treated. They didn't get the answer they were looking for so, he is going to put the grievance in writing. You know the facts of the grievance and the manager well and know it will be pointless for the mentee to raise a grievance. You know this action is going to be damaging for their career.

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16. It is your last meeting with your mentee and you know your mentee values your opinions and is reluctant to 'let go' of the mentoring.

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Mentee Résumé

Please complete this form and send it to your mentor before your first meeting.

My academic and professional qualifications

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My recent work experience

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My previous work experience

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My hobbies, sports and interests

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My awards or honours not mentioned above

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Other experiences that will be of interest to your mentor and will help you achieve your goals

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Mentee Development Plan

Career Goal – What position/responsibilities would you like to have within the next three to five years?

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SMART Goals – Describe to your mentor what you want to accomplish during this programme.

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What stands in your way of achieving these goals?

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Skills to Develop – Choose two or three skills that you want to focus on during this programme.

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Meeting Planner

This is a draft meeting planner that can be completed by the mentee or the mentor (or both).

Agenda Items for our meeting on	1. 2. 3.
What has been accomplished since our last meeting	
An experience I want to share with you is, or an upcoming opportunity for exposure is ...	
Some items I should look into/prepare for our next meeting are ...	
For our next meeting I would like us to think about ...	

SMART Action Plan

Complete this action plan and give a copy to your mentor

Where am I now?	
Where do I want to be? S pecific Goal – Not general	
How will I know if I've been successful? M easurable	
What barriers are there to overcome? A chievable	
Am I being R ealistic to achieve it?	
When do I want to be there? T ime bound	
Actions to be taken to achieve the goal:	
Support/resources needed to achieve goal:	
Date(s) to review goal:	