



Mentoring Training Course Workbook

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Mentoring Workbook

Table of contents

Contents		Page
Mentoring Workbook.....		1
Table of contents		1
1 Mentoring		3
2 Your experience of mentoring		4
3 The Mentor		5
3.1 The Ideal Mentor		5
3.2 The Role of a Mentor		6
3.3 Mentor Qualifications		7
4 Potential Benefits of Mentoring		8
4.1 Benefits to the Mentor		8
4.2 Benefits to the Mentee		8
4.3 Benefits to the organisation.....		8
4.4 Benefits for the line manager		9
4.5 Mentor versus Manager		10
4.6 Mentor versus Coach		11
4.7 Mentoring and Counselling		12
5 The Mentee		13
5.1 Mentee Qualifications.....		13
5.2 The Role of the Mentee.....		13
6 Duration of Mentoring.....		14
6.1 More than one mentee at a time		14
6.2 End of the relationship		14
7 The Do's and Don'ts of Mentoring.....		14
7.1 DO:.....		14
7.2 DON'T:		15
7.3 Mentoring is not a place to:.....		15
8 Mentoring Outcomes		16
8.1 Mentoring Skills.....		16
8.2 Discussions		17
8.3 Model Discussions		17

9	Phases of Mentoring Relationships	19
9.1	Meeting Suggestions	19
9.2	The First Meeting	19
9.3	Between First and Second Meetings.....	21
9.4	The Second Meeting	21
9.5	Reviewing the Mentoring Progress.....	22
9.6	Evaluating the Mentoring.....	22
10	Mentoring by Email and Phone	23
11	Case Studies - Possible Issues for a Mentor.....	23
12	Suggested Resources	26
APPENDICES.....		27
A	Mentoring Outcomes for the Mentor	27
B	Mentee Résumé.....	28
C	Our Agreement and Ground Rules	29
D	Mentee Development Plan.....	30
E	Learning Log	31
F	Mentor’s Planning Sheet.....	32
G	Meeting Planner.....	33
H	SMART Action Plan	34
I	Mentoring Review Sheet.....	36
J	Evaluation Form - Mentor.....	37
K	Evaluation Form – Mentee	38

Please Note

These are some example pages from the workbook.
Therefore the page numbers in the index refer to the full workbook,
not the example pages that follow.

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	Become familiar with the organisation and get up to speed
Support for development	Ensures effective learning
On the job learning	Enhance job related knowledge and skills
Diversity programmes	Ensure proper integration and fairness of treatment
Career progression	Assist in identifying and supporting potential talent
Succession planning	Develop potential managers of the future
Talent programmes	Develop talent, potential and capability
Redundancy and outplacement	Assist individual in managing the difficult transition
New projects	Ensure rapid assimilation and delivery
New job transition	Helps employee adjust
Within change programmes	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.

2 Your experience of mentoring

Exercise 1 – Think of people in your past that you know have influenced you significantly in a positive way. They could have been a useful role model or challenged and supported you to acquire a new vision and take a new direction.

Then answer the questions below:

1. What role did that person play?

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2. What did it do for you?

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3. What qualities did that person display that made them so valuable?

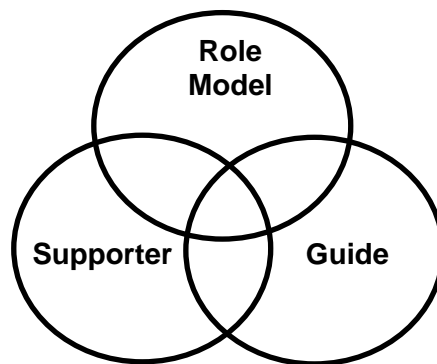
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4. How can you use that experience to the benefit of your mentee?

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3.2 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 organisation'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 the organisation's 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 organisation
- Identifies their leadership style and attitudes and behaviours that are not helpful
- Increases mentee's awareness on the affect s/he has on others.

4 Potential Benefits of Mentoring

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

Exercise 4 – 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 organisation

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4.4 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 mentoring and coaching have much in common. Both should use effective coaching skills by asking probing questions, challenging the person's thinking and exploring alternative perspectives.

The mentor may offer coaching and training from time to time as appropriate, but may also encourage the mentee to seek help from specialists in these roles.

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 organisation, their potential and capability.	A person who supports people to achieve their goals by goal setting, encouragement and questions.
The focus is on capability and potential.	Focus generally on skill and performance.
Performance criteria set by the learner.	Performance criteria may be set by a third party, by the coach or jointly with the coach.
A senior person in the organisation who knows the organisation, structure and policies of the organisation.	Often a specialist in the skills area who could be a consultant from outside the organisation.

Exercise 7 – The following are examples where coaching or mentoring would be appropriate. Read the example and tick if it is appropriate for coaching or mentoring.

	Mentoring	Coaching
1. Company cutbacks result in a skills shortage amongst some staff members.		
2. A new computer system was introduced and some employees are having difficulty dealing with it.		
3. A person has worked in the company for some time but is transferred to a new department or division.		
4. Employees who are believed to have high potential for rapid promotion.		

5 The Mentee

Mentees are usually employees who wish to expand their current knowledge of the organisation 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 organisation's policy but generally they include:

- member of staff identified by the organisation'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
- open, honest and receptive to feedback.

5.2 The Role of the Mentee

- To take responsibility for their learning
- 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. The organisation's 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

7.3 Discussions

Exercise 9 – The discussions you have with your mentee are vital for their development. Some of the following sentences are good to use and others are not.

Delete those which you believe are not good to use.

- “I’m far too busy to meet you next week.”
- “What do you want from me?”
- “You have done a good job with this action plan.”
- “Would you like me to have a word with your boss about this?”
- “What you need to do is
- “Let’s reflect on this for a moment.”
- “Get to the point, we haven’t got all day.”
- “Let’s check that I have understood.”
- “From what I have seen you are lazy and need to pull your socks up.”
- “Well she’s a woman; you have got to expect that sort of thing.”
- “What are the implications of doing this?”
- “What choices do you have?”
- “Sometimes I have difficulty hearing what you say because when you are very enthusiastic about something you talk quickly.”
- “You seem unusually quiet. How are you feeling now?”
- “I know your manager can be a bit awkward, that’s why he won’t get promoted further.”
- “I recommend you read/attend/speak with...”
- “How do you think you can improve the situation?”

7.4 Model Discussions

These are some model discussions you might like to consider using:

- “Where do you see yourself in the organisation?”
- “Where would you like to be three years from now?”
- “What steps can we identify to bring you closer to your career goals?”

Business update

- “What challenges are you facing now in your position?”
- “What is working particularly well for you?”
- “What has changed since we last met?”
- “Tell me about a situation you encountered since we last met.”

Examine strengths and challenges

- “What are some areas where you feel most comfortable?”
- “What strengths do you and your manager agree on?”
- “Which skills do you believe are holding you back?”

Develop Career Plans

- “Where do you want to get to?”
- “Let us discuss how realistic it is.”
- “What are some realistic milestones we can set?”
- “Who are some people in the organisation who you would like to interface with?”
- “Some approaches I’ve used are ...”

Follow-up items

- “What have you got out of this meeting?”
- “What are you going to do as a result of this meeting?”
- “What do you want to do before our next meeting?”
- “Let’s take a look at the goals we previously set and see if any need to be changed.”

This is a good time to look at your role as a mentor and the skills that you need to perform that role.

Exercise 10 – Please complete the questionnaire in Appendix A

8 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.

8.1 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
- In most mentoring programs, mentors and mentees tend to get together every 4-8 weeks, with telephone or e-mail contact in between. However, if a relationship is at its very beginning and/or the mentee requires a lot of support, this might not suffice. 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. If appropriate, reduce the frequency of meetings to once every 2 or 3 months at the later stages of a mentoring relationship.

8.2 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 Mentee Résumé such as that shown in Appendix B to complete before the first meeting.

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

A mentee will benefit from your:

- knowledge of the organisation (politics, culture, history, character)
- experiences (what has gone well and not so well, overcoming obstacles)
- personal qualities and skills (openness, empathic, enthusiastic, motivated)

8.4 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.

8.5 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.

9 Mentoring by Email and Phone

Face-to-face meetings are best for building rapport and developing interpersonal skills. However, when this is not practical mentoring can also take place by email and/or by telephone.

If this occurs consider the following guidelines

- If possible, meet face-to-face at least once before the 'distance' mentoring begins. If this is not possible, follow the principles of the first meeting described earlier and allow time for a good working relationship to develop
- The ground rules and boundaries that underpin face-to-face mentoring apply with equal importance at a distance
- Agree timescales for checking and exchanging emails and/or calls (whether daily/once a week/fortnightly). This will vary at different stages of the mentoring relationship
- Agree response times to emails/phone messages
- Be ready to seek clarification to avoid misunderstandings and jumping to conclusions.

10 Case Studies - Possible Issues for a Mentor

Exercise 12 – 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 be done to prevent people not selected for the mentoring scheme from being negative towards the scheme?

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3. You are tasked with a large project that will make meetings virtually impossible.

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4. With your help and guidance the mentee has developed but is unrealistically expecting a promotion at the end of the program.

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5. It is apparent that your mentee is having problems at home which are affecting their performance at work. The mentee is reluctant to talk about this.

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6. Your mentee wants you to speak to their HR manager about an issue they do not feel comfortable talking to her about.

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7. A keen young member of your staff appreciates that you cannot officially mentor them, but asks if you could do it unofficially.

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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 mentoring scheme.

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Learning Log

Date:	
Event or significant experience:	
What happened? did I contribute to it? actions did I take? did I say and do? did I feel?	
So what does this mean? Why did this happen? How could you have dealt with it differently? What are the options for the future?	
Now what? What I am going to do now? How can I best use this information? What I would do if it happened again? How else might I use what I have learnt?	
Further issues:	