

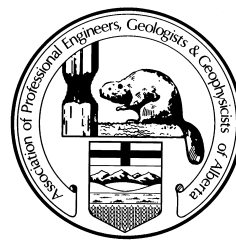
**APEGGA**

*The Association of  
Professional Engineers, Geologists  
and Geophysicists of Alberta*

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***Strategies for Success  
in Mentoring***

***A Handbook for  
Mentors and Protégés***



## FOREWORD

This handbook was prepared by APEGGA's Mentoring Committee and was approved by the Council of the Association in November 2003. It replaces *Mentoring: A Guideline for Members-in-Training and Professional Members* that was published in 2000. Material in the previous edition has been revised and augmented with worksheets that members may find useful in forming a mentoring relationship.

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The committee wishes to thank Judith Lentin, P.Geol. for writing this handbook and the following companies who participated in a pilot project to set up mentoring programs within their companies.

**Platinum Participants**

Precision Drilling

**Gold Participants**

ENMAX Corporation

City of Calgary

Honeywell Limited

**Silver Participants**

Wiebe Forest Engineering Ltd.

**Bronze Participants**

EBA Engineering Consultants Ltd.

ESBI Alberta Ltd.



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## WORKSHEETS

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## CHAPTER 1 – INTRODUCTION

### WHY MENTORING?

APEGGA recognizes the benefit to society of mentoring and how it supports the goals of every organization. The transfer of skills and knowledge from experienced professionals to less experienced professionals in the organization provides continuity, succession management and continued learning for all involved. Mentoring empowers younger professionals with skills they may traditionally have acquired through trial and error.



Becoming a new professional or MIT can be similar to climbing an unknown mountain without a map or a guide. New climbers may do all right on the lower slopes, but when the going gets tougher they may fall. If they have a guide to help them up and to point out the dangers ahead, they may safely climb higher. On the other hand, without a guide, their next fall may end their career as a climber. All members of APEGGA are encouraged to be actively involved in mentoring activities, either as mentors (guides) or protégés (climbers).

To that end, APEGGA is committed to assisting the mentoring program by facilitating the formation of effective mentoring relationships. This handbook is designed to provide a map to mentorship for mentors, protégés and their managers.

It should not be used as the only resource. APEGGA encourages you to consult the print and electronic references available on the APEGGA web site. Colleagues in other professional associations are also excellent sources of background material on mentoring. There is even a *Coaching and Mentoring for Dummies* available at your local bookstore.

In today's workplace, two types of mentoring relationships are generally recognized – informal and facilitated. The APEGGA Mentoring Program is a hybrid of these two styles. In general, mentor/protégé relationships will receive some initial facilitation through workshops, written support materials and possibly through software. The mentor and protégé are then responsible for establishing goals and timelines for their individual mentoring relationships, working toward them and evaluating their efforts. The program is designed to last for one year with personal evaluation at the end of six and 12 months.

This handbook provides best practices, advice and hands-on worksheets that will enable both mentors and protégés to enter into a relationship more confident of each party's expectations and what can be accomplished. You will find that to work effectively, the relationship should be driven by the protégé whose goals you are trying to achieve. This advice is provided as a result of extensive literature research and working with Alberta companies in launching their mentoring programs in the APEGGA Mentoring Pilot Project. It is strongly recommended that both protégés and mentors keep track of how their relationship is developing by keeping a logbook.

When climbing a mountain, the person on the other end of the lifeline is the most important person on the planet. Mentors hold a lifeline for their protégés.





## CHAPTER 2 – MENTORING: HOW IT WORKS

### WHAT IS MENTORING?



Mentoring is a planned pairing of a more skilled or experienced person with a lesser skilled or experienced one with the agreed-upon goal of having the lesser skilled person grow and develop specific abilities to reach long-term objectives.

For the sake of simplicity in APEGGA, the term “mentor” refers to an individual with whom a less experienced person has established a formal relationship with clearly defined goals. The protégé (or mentee, trainee, apprentice or candidate) is the individual with less experience. The protégé and mentor are two individuals who will engage in a structured relationship with specific objectives. The mentor will share with the protégé the responsibility of achieving the goals rather than bear sole responsibility.

In the APEGGA context, Professional Development Hours can be claimed for mentoring activities. The relationship must be based on specific goals driven by the protégé but jointly arrived at with the mentor. The relationship may be more structured as is suggested by the worksheets in this guideline or it may be based on a natural chemistry

between the two partners. The relationship, however, should be between two individuals who do not have a direct reporting relationship but rather a relationship in which coaching and counseling can be delivered in a non-judgmental way.

Within the APEGGA Professional Development program, mentors can claim the time invested in mentoring under Participation. Protégés may claim their time under Informal Activities.

As a mentor, you can help aspiring young people find their way in the technical world in which they live.

### HISTORY OF MENTORING

In Greek mythology when Odysseus, King of Ithaca, went off to fight in the Trojan War, he asked his best friend, Mentor, to look after the development of his son, Telemachus. Mentor’s task was to educate and train the boy to fulfill his birthright. Mentor helped Telemachus to become an adult who would inspire his father’s pride. When Odysseus failed to return home at the end of the war, Telemachus left the safety of his home to find his father and bring him home. The goddess Athena, disguised as Mentor, traveled with him. The triumph of this venture proved the success of Mentor – and mentoring.

Since then mentoring has had a long and reputable history. Through time, mentoring has included trade and craft guilds, apprenticeship systems and matching based on similar learning styles. Mentoring has regained popularity under a variety of names and styles, again mainly as a method by which a less experienced individual can learn from a more experienced one. The United States Congress named 2001 as the “Year of the Mentor” and strongly encouraged cities and towns to organize volunteer programs to match adults with teens to help put them on a career track.

There have been a number of innovations in mentoring. Most recently e-mentoring has been shown to work extremely well after an initial level of trust and certain ground rules have been established. In 2001, the University of Alberta and the University of Calgary launched “SCiberMENTOR”, an e-mail mentorship program designed to match women in science and engineering with girls between the ages of 11 and 18. Often the mentors and protégés never meet each other face-to-face but have enjoyed effective written correspondence.

## WHY IS MENTORING BENEFICIAL?

Imagine that you aspire to be a great mountain climber. You have a new pair of boots, a tent, a backpack and endless enthusiasm, but you have never done much more than climb the stairs when necessary. As mentioned in the introduction, there are two ways to becoming a good mountain climber. You could take a practice run with somebody who has lots of experience and the willingness to share it. The other way is to be taken to the base of a high mountain, dropped off and told to get to the top or quit. If you don't make it, your enthusiasm disappears and you seek ways to avoid similar challenges in the future.

Too often, new professionals find themselves alone at the bottom of the world's tallest mountain. Having a mentor will help provide the confidence they need to climb the obstacles to a great career.



## MENTORING STYLES

There are many different styles of mentoring depending on the type of organization and the individuals involved.

### Casual Mentoring

Casual mentoring is what some individuals are referring to when they give public recognition to a mentor who has served as a role model or example. The mentor may not be aware that the protégé is using their behaviours as an example to follow. Everyone engages in this type of mentoring, but it has no formal structure or defined objectives – it involves simply learning from the good habits and behaviours demonstrated by others. This is not to suggest that casual mentoring is without value since much can be learned from others even in passing interactions.

### Informal Mentoring

Informal mentoring relationships are unplanned relationships. These mentoring relationships grow out of a chance connection between two people and are further built into a relationship in which there is transference of skills and knowledge. There is no contract or list of goals. The relationship may move from professional to personal and may last a lifetime. These mentoring relationships are unquestionably valuable, but 'just happen' as opposed to being actively developed.

Informal mentoring can be enhanced if the participants in the relationship take the time to have "formal" discussions and establish specific goals for the transference of certain skills and knowledge within set time periods.

### Non-facilitated Mentoring

Non-facilitated mentoring relationships are those with structure, such as a mentoring contract, but they have no coordinated assignment of mentor-protégé pairs. The individuals make a mentoring connection without external help or direction. The individuals will have supporting material such as written guidelines or seminars and will be cognizant of their individual and paired expectations. They will undertake a mentoring contract and will consult their respective employers if necessary. They may have access to resource persons for help. Non-facilitated mentoring may include multiple or group mentoring and e-mentoring as described below.

### Facilitated Mentoring

Facilitated mentoring is a structured program that involves a coordinator who assigns mentoring pairs based on character, skills, need and other criteria. The APEGGA Mentoring Pilot Project falls in this category. Some

other large corporations have facilitated mentoring programs as part of their company orientation practices, or as succession management strategies. The matching process is time-consuming and requires considerable human and capital resources. Facilitated mentoring also helps design contracts, creates reasonable lists of goals and tracks the mentoring pairs to see if the relationship is working and if not, steps in to help facilitate the relationship. Although this may be the best kind of mentoring program, the cost is often prohibitive.

### **Group Mentoring**

This is relatively new idea, or renewed idea, as it was a practice hundreds of years ago under various names. Group mentoring occurs when a number of mentors serve together as a resource for a defined group of protégés with similar expectations. The mentors bring a variety of skills to protégés and share responsibility for each protégé's growth. The group may meet at regular intervals and unlike a one-on-one pairing, if one or two mentors are unavailable, the protégés will still have a contact person. The protégé group also benefits from the varying backgrounds and skill sets of their peers and may not need the mentors' presence at each meeting. All involved benefit from the network of colleagues.

### **Multiple Mentoring**

A protégé may wish to consider having a number of mentors, each of whom offers different skills and experiences. Because the relationship must benefit both parties, the protégé should not use the mentors only as skill improvement stations, but the protégé should also try to offer in return some elements of their knowledge or experience that might be of benefit to the mentor. It is up to the protégé to decide who will make a good mentor and approach that individual with a plan.

### **E-Mentoring**

E-Mentoring can be successful if those matched in the relationship are equally adept at using computers. A good deal of trust is required because comments made in writing can be much more career limiting than a comment made in casual conversation. Because of this fact, mentors and protégés must give serious consideration to limiting topics. Written comments about difficulties experienced with one's boss or someone else in the organization would have to be avoided on-line, thus limiting the value of the relationship. Those using e-mail for personal correspondence should seriously consider using passwords on confidential documents. Using e-mail for the everyday organization such as setting up a private meeting for discussions of sensitive subjects can overcome the problem. E-mentoring is becoming more and more popular because it helps to overcome some of the problems caused by full schedules and jobs that require travel.

## **CRITICAL MENTORING SKILLS**

There are specific core skills that everyone should use in a mentoring relationship. They are listed below.

### ***Listen Actively***

Most of us have never been trained in how to listen to other people. While we may think we are pretty good listeners, most people don't listen as well as they could. Some common traps and tips to avoid them include:

- **Listening to respond.** Stay focused on what the speaker is saying until it is your turn to talk. Don't formulate your answer until they are finished. You'll miss the end of their statement.
- **Making assumptions.** Check out what you have heard. You do this by playing back or summarizing, in your own words, what you think the other person has said. You might say, "So you think your boss doesn't like you. Is that right?" or "So you feel that I should take a course in Effective Technical Writing?" Or check to see if you understand how the other person feels. You might say, "You sound really frustrated or hurt." or "You sound frustrated with me." If you have truly heard each other, you will notice how relieved the other looks when you affirm what you hear or sense. People rarely feel that they have been listened to and understood. Confirmation is a powerful thing.

If you think your partner has it wrong, don't be afraid to express your concerns.

### **Question Openly**

Most of us do not excel in asking questions because we tend to ask questions that solicit a Yes/No answer – THE CLOSED QUESTION. It is better to ask questions that give the person a chance to expand on the subject or their opinion – THE OPEN QUESTION. An example of a closed question might be to say, “Do you like your job?” To turn that into an open question you might say, “How do you feel about your job?” Learning to do so enables you to understand each other better and to develop a major life skill.

### **Read Body Language**

Sometimes body language says much more than words do. Some examples:

- Looking away – avoiding eye contact may mean discomfort, upset, disagreement, embarrassment
- Crossed arms – anger, defensiveness, closed to the other’s opinion
- Head in hands – fatigue, upset
- Moving backwards, tilting chair back – feeling space invaded
- Fidgeting, foot tapping – anxiety, boredom
- Hands covering eyes or mouth – sadness, shame

### **Avoid Communications Roadblocks**

Some styles tend to get in the way of good interaction, for example:

- **Ordering** – telling someone what to do
- **Threatening** – telling someone that there is only one course of action, i.e. “If you don’t pay attention to this problem, I will stop seeing you.”
- **Preaching** – telling someone how to behave
- **Avoiding** – trying to avoid an uncomfortable situation in the hope it will just go away
- **Pacifying** – trying to make someone feel better without having solved the problem
- **Lecturing** – giving someone unsolicited advice

### **Build Trust**

The following suggestions may help you develop rapport and build trust:

- Call just to talk
- Pick a good place to meet away from your offices
- Help each other prepare and offer suggestions
- Prepare yourself
- Be on time
- Set a comfortable tone

## **THINGS TO BE AWARE OF**

**Personal aptitude:** Not everyone is suited to being a mentor or a protégé. The Mentor and Protégé sections of this guideline outline desirable attributes or competencies that are specific to either mentor or protégé. The following are attributes that both mentor and protégé should possess.

**Control:** The protégé should manage and set the goals for the relationship. After all, it is the development of the protégé that is primarily at stake. That is not to say that the mentor does not have any input, but the protégé must be the one who takes responsibility for the process and outcomes.

**Non-technical relationship:** In the context of the APEGGA program, a mentoring relationship does not exist to develop the protégé’s technical skills. Any technical content should, at most, be a very minor component of the relationship.

**Time:** Good mentoring takes time – time spent in active discourse and time preparing for meetings. It is recommended that the mentor and protégé be prepared to commit to a minimum of two hours per month for mentoring activities, including preparation and review.

**Access:** The protégé must be able to contact the mentor easily. Mentors must respond in a timely fashion. Protégés may need a few moments of their mentor's time on short notice. An important component of professionalism is the respect for the time of others. Define reasonable limits and identify demands that are excessive or unreasonable.

**Intimacy:** A good mentoring relationship promotes trust and open, honest, meaningful communication. The danger is that this relationship may be interpreted as a more intimate one by either of the participants or by an outside observer. This can lead to spousal jealousy, gossip or hurt feelings. It is important to be aware of these potential pitfalls and guard against them.

**Sensitivity:** Be sensitive to cultural and gender differences. One of the goals of this handbook is the acclimatization of a great variety of individuals into the professional and technical culture of Alberta and Canada. This does not negate the rights of individuals to their gender or culture, however different from your own. Some of the most effective protégé/mentor matches involve very different individuals.

**Gender:** Mentoring relationships between men and women can be subject to some unique complications. Men tend to value hierarchical relationships, while women tend to emphasize co-operative efforts. Men and women often communicate with different speech patterns that can be an impediment to mentor-protégé communication. Either of the participants may be unsure of what is appropriate behaviour with the opposite sex within a mentoring relationship and there is always the possibility of gossip. These issues are manageable if addressed early in the mentoring relationship.

**Differences in culture:** While this often refers to differences in personal culture, it can also be applied to differences in professional or corporate culture. The mentor and protégé must both be aware of these differences and respect them. Differences in corporate culture are especially important when the mentor and protégé do not work for the same employer. In that situation, the mentor must be sure to take differences into account when dispensing advice.

**Confidentiality:** In order for a mentoring relationship to succeed, it must be completely confidential. This is especially important when the participants work for different organizations. Any information that either the mentor or protégé receives about the other organization must be kept confidential and not be relayed to their co-workers or exploited for personal gain. Before a cross-organizational mentoring relationship is established, both participants should fully disclose their intentions to their respective employers. It is important to remember that, in the APEGGA context, a mentoring relationship does not exist for technical reasons. Its purpose is to aid the protégé in developing other career skills. Any technical content should be at the most a very minor component of the relationship. Technology transfer works much better in a coaching relationship.

**Favoritism:** This is a risk in any professional relationship. A mentor who supervises a protégé who is also an employee must take particular care to avoid favouring that person. It is recommended that mentor/protégé pairs not be established between a protégé and a direct supervisor to help avoid these situations. Mentors must evaluate their own effort in the relationship.

**Cloning:** The purpose of a mentoring relationship is for the mentor to facilitate the protégé's development based on the mentor's greater experience. It is not for mentors to mold their protégés into duplicates of themselves. Protégés must be allowed to develop in their own ways. A mentor can make suggestions about what might best be accomplished but the final decision must be left to the protégé.

**Terminating the mentoring relationship:** This important issue needs to be discussed early in a mentoring relationship. How will the participants know when the relationship has reached its conclusion and should be ended? How will the relationship be ended? Clear, early definition of this issue will ensure that there are no guilty or hurt feelings on either part when the mentoring relationship does end. As mentioned in Chapter 2, the APEGGA mentoring relationship should last one year. A sample contract is given in Chapter 3 to provide a guideline for creating this important document if required.





## CHAPTER 3 –THE PROTÉGÉ



### ATTRIBUTES OF A RECEPTIVE PROTÉGÉ

Being involved in a mentoring relationship requires effort. Anyone who wishes to improve their skills through the use of a mentor should consider these issues.

#### Willingness to Learn

Successful protégés must have a willingness to learn from their chosen mentors. A mentoring relationship is interactive and requires the protégé to be committed to setting goals and working toward specific learning objectives.

#### Willingness and Ability to Self-Evaluate

Protégés need to be able to assess their skills objectively and evaluate potential opportunities for self-development. They should have a personal vision, specific career/life goals and a good grasp on current career realities. This self-evaluation is required for the protégé to identify potential mentors and set objectives within the mentoring relationship. Before asking for help, protégés should know their tentative career/life goals, their strengths, the development they need and the *specific* assistance they would like. The more they understand about themselves, the more accurately they can present their goals to their potential mentor. Some ways to demonstrate their ability to evaluate their skills include:

- Understand what is important to them, what they value and what they desire most
- Recognize areas which they perform very well, find concrete examples of behaviors they can perform at a good-to-excellent level
- Identify specific weaknesses or areas in which others have indicated that the protégé needs to grow and develop.
- Set tentative one-to-five year goals for both their personal life and career, and
- Describe accurately the reality of work situations in which they are involved.

### Learning Style

Different people learn new ideas and concepts differently; for example, some people learn through verbalization and others through reflection.

Since mentoring is a tool for learning, it is important for protégés to understand how they learn so they can evaluate whether mentoring is an effective learning tool for them. If mentoring is right for them, knowledge of their learning style will be important in the choice of a mentor.

### Time

Building a mentoring relationship takes time. Good protégés recognize that a mentor's time is valuable and ensure that they adequately prepare for each face-to-face meeting. It is recommended that protégés be prepared to commit a minimum of two hours every other week, in addition to the time for meetings, for mentoring activities, including review and preparation. Finding time to do the many things required as a new professional is often difficult. Time management is an acquired skill that comes with experience, but can be augmented with appropriate time-management training. If protégés have difficulty meeting the time commitments of the mentoring relationship, they could ask the mentor for advice and ask their supervisor about training-on-the-job.

### **Commitment and Building Trust**

Protégés must be committed to achieving the objectives of a mentoring relationship. Persistence is an important part of the process. The more the mentor is able to trust in the protégé's ability and willingness, the more committed he will be to the partnership. This trust develops over time as the mentor observes appropriate behaviors on the part of the protégé. To become trustworthy, protégés must:

- Keep confidences shared with their mentor
- Spend quality time together
- Refrain from criticizing their mentor to others
- Respect boundaries set by their mentor
- Admit errors and take responsibility to correct them
- When they disagree with their mentor, they should tactfully explain why. It is not productive to be a "yes-person"

### **Listening Actively**

Active listening is an important skill for both mentors and protégés. When protégés listen well, they demonstrate to their mentors that they are interested and understand what they are saying. Protégés can demonstrate their active listening by:

- Showing interest with encouraging responses such as "hmmm..." and "yes..." or by paraphrasing certain comments in their questions to show they understand
- Using nonverbal signs of understanding, such as nodding their heads, leaning forward, and smiling
- Avoiding the interruption of others when they are talking
- Showing interest and remembering comments made in previous meetings
- Summarizing key elements of conversations as the meeting draws to a close

### **Self-Confidence**

Much of the responsibility for initiating a mentoring relationship is, and should be, with the protégé. A protégé needs to have the self-confidence to approach potential mentors and effectively present the potential merits of mentoring relationships. One very important part of self-confidence is the ability to encourage others. This includes giving their mentors recognition and sincere positive feedback. There are many different kinds of feedback and mentors vary in the amount and kind of encouragement they feel comfortable with, for example:

- Compliment the mentor on known accomplishments
- Point out positive traits such as perseverance and integrity that have been observed
- Praise the mentor privately
- Write an encouraging e-mail or complimentary voice mail
- Express thanks and appreciation and let the mentor know how suggestions have been applied or ideas used

### **Confidentiality**

The mentor will expect, and the relationship demands that the details and particulars discussed with the mentor be kept in confidence. Any situation involving a risk to the public would override this expectation. In mentoring situations in which e-mail must be used because of distance, it is very important to ensure the e-mail messages go only to the mentor. Protégés should consider setting up a password on their mentoring e-mail and should be sure that mentoring letters cannot be opened in error by someone else in their office.

## PROTÉGÉ'S PERSONAL EVALUATION

Before starting a new relationship, it's a good idea for protégés to step back from their day-to-day life and ask themselves – "Where am I? How am I doing?" This activity will also help them get feedback from their mentor on how s/he sees them. They should be sure to complete this exercise before the first meeting. The mentor will be doing a similar exercise in preparation for the meeting.

### Instructions

The purpose of this tool is to help you get a real picture of where you are – if you're not honest, you'll end up with a picture of someone else, not yourself, and that won't help you become who you want to be! Answer these questions as honestly as you can:

(1) What are my top five strengths as a person – the top five things I feel good about and am proud of?

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

(2) What are the five areas in which I could improve as a person – the five things I most want to work on or improve about myself?

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

(3) What are the top five opportunities available to me at this moment – things I could do, act on or take advantage of that would help me develop and reach my potential?

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

(4) What are the top five threats I'm facing right now – well-defined threats in the world that could keep me from achieving my dreams?

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

(5) What are the five most important things I can do over the next six months to build on my strengths and overcome my challenges?

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

### **The Protégé's Role**

Before proceeding with any mentoring relationship, the protégé should consider the following points. It is appropriate to review this list from time to time during a mentoring contract in order to review your commitment.

- I am committed to using the experience of my mentor and to accepting the insights that s/he believes could assist me.
- I am committed to improving my skills in order to meet the goals I have set.
- I am committed to working with my mentor for the time/frequency agreed upon in the mentoring plan.
- I am open to learning and receiving feedback from my mentor.
- I am interested in learning from someone whose background and experiences are different from my own.

If you consider that you are ready to work with a mentor there is another important step to take before beginning the task of finding a mentor. Experts on self-help, leadership, personal development and career success planning are all passionate about the first rule for protégés – *know your personal vision*. What do you plan to do with your life in the next three to five years?

## A PROTÉGÉ'S VISION

### Creating a Vision

It is not always easy to set goals. Most of us know we want to be successful, but after the stress of graduating from university and learning the ropes in a new job, we often fail to determine what is needed to become successful. The first step in setting goals is to find a quiet place where you can sit and consider the future. Think about where you can realistically expect to be in three to five years. Place these expectations in one column and then list what you must do to meet the expectation beside it. Here are some questions that may help to get you started:

- What are my strengths?
- What are my major needs?
- What are my short-term job objectives?
- What are my long-term job objectives?
- What are my long-term career goals?
- What do I bring to the table?
- What are the most important things I should be accomplishing in my job?
- Do I feel successful at my job at this time? If not, what is preventing me from succeeding?
- What do I like best about my job?
- If I could add variety, autonomy, and importance to my job, how would I use them?
- What have been the most significant learning experiences in my career?
- Would I benefit from any particular type of training?
- How do I learn best?

from doing?                       from watching?

from listening?                       from experimenting?

- What do I think most hinders my success?
- What scares me?
- What makes me want to learn more?
- Which talents do I lack?
- What is the toughest stretch for me?
- What is my most satisfying success?
- What is my most disappointing failure?
- If I had a mentor, what are the most important things that person could help me with?

Now that you have taken the time to answer some fundamental questions about yourself, see if you can create a mission statement for yourself. Remember that major corporations spend thousands of dollars to have consultants help them develop the “perfect” mission statement. What you create may not be perfect, but it will reflect how you are thinking today – you can always up-date your mission statement.

### **CREATING A PERSONAL MISSION STATEMENT**

A personal mission statement explains who you are and who you want to be, and what you represent. You can use it to guide you when making choices and decisions, large and small, by asking yourself – does it help me become who I want to be? A personal mission statement also helps you explain who you are to others.

#### **A Two-Step Approach**

A personal mission statement should answer three questions:

- (1) What is my life about – what is my life’s purpose?
- (2) What do I stand for – what are my values?
- (3) What accomplishments am I working toward that will help me fulfill my life’s purpose in a manner consistent with my values?

#### **Step 1: Clarifying purpose and values**

A. Write a list of at least 20 talents you have – pretend there is a big reward for coming up with each one.

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B. What excites you about your life? About the world? What angers you about your life? About the world?

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C. What would a really good day be like for you? Where would you be? What would you do? Imagine anything – it doesn't have to be true.

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D. Imagine that today is your 50th birthday, and a reporter is writing a story about what you have done. What would you hope people (your friends, the people you work with, family members) would say about you to the reporter? What difference would you hope you had made in their lives? How do you want to be remembered?

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E. Imagine yourself at 100 years old, surrounded by your loved ones – talking with them in a comfortable, relaxed setting. These people have gathered to learn from you and your wisdom. What would you tell them is important in life? Looking back on your life, what really matters to you?

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**Step 2: Drafting a Mission Statement**

Look over what you’ve written during Step 1. Then look again at the three questions a mission statement should answer. Consider how they fit together and how they can lead to a conclusion.

Write a rough draft of your personal mission statement. It should be brief but should still express who you are. When you read your personal mission statement, you should feel something, like “yes, that’s who I really am!”

The greatest mistake you can make in life is to be continually afraid of making a mistake.

**My Mission Statement:**

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Keep your draft personal mission statement with you and look at it several times during the day – see how it makes you feel. You may want to bring it to the next several meetings with your mentor to talk about it and see if you want to change it.



## SETTING GOALS AND OBJECTIVES

Before you can have that very important first meeting with a potential mentor, you need to be able to tell the prospective mentor what you want from him/her. If you know what your goals and objectives are, you will be able to explain what you want and need from a mentoring relationship. Knowing this will help you make decisions about whom to approach as a potential mentor, that is, the best person to help you meet your goals.

There is an old saying, “If you don’t know where you are going, any road will do.” Unfortunately, most of us have never been taught how to set goals or to develop personal mission statements.

**Goals** define the direction in which you are headed over the next several years. They are not short-term. It may take months or even years to reach them and they may not be clearly measurable. For example, you may set a goal of improving your cardiovascular fitness. You may be thinking about education or perhaps have a goal of getting a masters degree.

**Objectives** are smaller steps that you take to make progress towards your goals. To be useful, objectives must answer the questions “what will change, by how much and when?”

In order to create the kind of life you want, it helps to have a clear picture of where you are headed – your personal mission. It is equally important to make a plan on how to get there – how to make your dreams come true, one day at a time. By writing down goals and objectives for yourself, you are taking a big step toward making them happen. The next step will be to actually do these things – and keep a record. This is something you and your mentor can work on together over time.

**Writing Goals:** Here are some of the kinds of goals a young professional like you might be interested in setting.

- **Career** – where do I want to be in my career in five years?
- **Art/Music/Creativity** – what goals do I have for my creative side?
- **Education** – where do I want to be in several years in terms of my education?
- **Relationships** – three years from now, what do I want my relationships to be like? Do I want more friends? More time with family? A better relationship with my family? To be married? To be single?
- **Spiritual** – what kind of spiritual growth or involvement do I see for myself over the next few years?
- **Sports/Fitness/Health** – if I am successful, what will my health and fitness be like several years down the road?

**Example:** One young person might write: Three years from today, I will be:

- Finishing my Masters degree
- Living on my own – not married
- Working at the company of my dreams
- Taking piano lessons
- Working out – more fit
- Active in doing community service

### Writing Objectives

Objectives are the smaller steps you take to make progress toward your goal. To be useful, objectives need to answer the question “what will change, by how much, by when?”

Usually objectives work best when they are written for the next few months to a year. It’s hard to know what will change beyond that timeframe, so it’s hard to set realistic objectives for longer periods.

### Example

Let's say you're a new graduate in engineering with a goal of obtaining an MBA while you are working full time in industry. Some good objectives might be:

- Begin weekly study for the GRE by talking to a guidance counselor about requirements for admission
- Determine what I need to do by \_\_\_\_\_ (date)
- Discuss your goals with your supervisor and ask his/her opinions on how to succeed
- Read at least \_\_\_\_\_ (number) books on the subject by \_\_\_\_\_ (date).

The following page provides space for you to write down the goals and objectives that you have been thinking about as you read. Any goal or objective that is written down has at least a 50 per cent greater chance to be achieved than something that just passes through your mind.

Keep this sheet of paper handy. Look at it often and add to it as your understanding of yourself develops. Your goals and objectives may change on a daily basis, depending on the situation. If you keep track of the changes, you can see yourself grow.

Here's a tip on how to test if your objectives are solid – ask yourself, are they “SMART?” SMART stands for:

“**S**”pecific – do I know precisely what has to happen?

“**M**”easurable – how will I know if I've achieved this objective?

“**A**”ttainable – is it realistic or do-able?

“**R**”esult-oriented – will it really move me toward my goal?

“**T**”ime-limited – does it have a due date?

If your goals are **SMART**, they're solid – now it is time to begin looking for a mentor.

*“If people knew how hard I have had to work to gain my mastery, it wouldn't seem so wonderful.”*

*Michelangelo (1475-1564)*

## GOALS AND OBJECTIVES

Goal: \_\_\_\_\_

Objectives:

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Goal: \_\_\_\_\_

Objectives:

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Goal: \_\_\_\_\_

Objectives:

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Goal: \_\_\_\_\_

Objectives:

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Goal: \_\_\_\_\_

Objectives:

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## FINDING A MENTOR

First and foremost: discuss your plans with your supervisor! It does not matter if you plan to approach a mentor outside or inside the company where you work. Your supervisor may suggest other potential mentors or may even facilitate a first meeting which would be very helpful.



In some programs it is possible to have more than one mentor; however, our program will not be using group mentoring.

Mentoring is a tool that can be used to complement your career development process. You may already have established a coaching relationship with your direct supervisor. A mentor can help you develop skills and competencies in which your supervisor may not be an expert or for which they may not have time.

Once you have created your continuous learning objectives and career development plan, it is appropriate to share your mentoring needs with your supervisor. He may be able to help you identify a potential mentor. There is no question that he will be impressed that you have taken the initiative and know what you want and need in the work environment, and may provide suggestions that will help you develop.

### Attributes to consider when choosing a mentor

- How interested is your potential mentor in developing his/her mentoring skills?
- How much time does your potential mentor have available? Is the person already involved in other mentoring relationships?
- How similar is the potential mentor's personal style to your own?
- Does the potential mentor have a similar professional or academic background to yours?
- Has your potential mentor had a career path (or even life path) from which you would like to learn?

### What to look for in a mentor

- Available time
- Seniority
- Roles or responsibilities that are different from yours
- Someone willing to share special projects
- A person who is active in professional societies and has a network of associates
- Diversity: it is important to seek someone not exactly like yourself. Try to learn new approaches and develop your creativity by seeking out people with different learning, problem solving, and people management skills

### Approaching a potential mentor

When you decide that you are ready to have a mentor, some thought needs to be given to just who to approach. Since it is important that you discuss your plans to get a mentor with your supervisor, it is a reasonable plan to ask for suggestions from him about potential mentors. Your friends or university professors may also provide ideas about people who would make good mentors.

Approach your potential mentor with a well-developed plan for the mentoring relationship. The mentor needs to be able to assess if s/he will be able to help you acquire the skills or competencies that you want to develop. Do not feel badly or rejected if a potential mentor says no to the request to become your mentor. There are many reasons that s/he may feel compelled to say no. For example:

- Realize that your potential mentor may not feel s/he is an appropriate mentor for you.
- S/he may already be involved in other mentoring relationships and not have the time to commit to another protégé.

Always thank the potential mentor for their consideration and ask if they have any suggestions for a mentor for you. They will be anxious to make suggestions because nobody likes to say no when receiving such a flattering request.

There are a few rules you can follow to help guide you during your search for a mentor. These rules have been revised from the book *The New Mentors & Protégés* by Linda Phillips-Jones.

- Always use common terms in discussing a potential relationship. Using terms like protégé or mentor may literally frighten away someone who would be a good mentor, but doesn't feel comfortable being called a mentor.
- Always be friendly but not pushy or desperate as you are looking for a mentor. If you appear to be too "needy", a mentor may avoid a relationship because you appear to be too big a risk.
- Always be a good listener and hear what your mentor candidate is saying. If you oversell yourself by talking too much or use a canned presentation you may miss the signals that indicate how the relationship might develop.
- Always be persistent, don't give up too easily. It is always difficult to know what is going on in another person's life. You may meet them on a day that has gone wrong from the first moment- it isn't you; it is the day. When a person you know to be nice isn't, try to understand why and approach him/her again on a day when they are smiling.
- Always get back to your prospective mentor immediately after they have shown an expression of interest in being your mentor. If a time lag occurs your potential mentor may change his/her mind.
- Always follow up with a *hand-written* thank you note after you have had a meeting with a prospective mentor. This is a golden rule for success and shows good manners, regardless of the meeting's outcome.

The following checklist covers about everything that can be thought of in the scope of the protégé's role. It is not necessary to take each step, but it is valuable for you to read through the list and determine what you want to do.

It is important to record what you do in the development of this special relationship. In addition to this checklist Appendix A provides a separate logbook for you to use during your relationship. Both mentors and protégés should keep good records of the relationship. Always review notes of previous meetings before going to the next meeting to ensure you have done everything you promised at the last meeting.

## PROTÉGÉ'S CHECKLIST OF TASKS

Directions: The following are suggested tasks or activities you can complete as you work with your mentor. They are suggestions only; tailor the list to your needs, your style, and your mentor's style. One way to use the list is to check the tasks you plan to do (left box), then check it off (right box) as the task is completed.

### I. PREPARING FOR THE PARTNERSHIP

#### Plan to Do – Done

1.   Read through all available materials on mentoring. Check the library and internet.
2.   Review your past mentoring experiences for insights to use in this new mentoring partnership.
3.   Talk with your manager about your participation in the program, your goals, and ideas for development activities.
4.   Complete any mentoring program application procedures.
5.   Attend any seminars or other training events available for mentoring.
6.   Prepare Goals and Objectives from the materials in Chapter 3.
7.   Design a Potential Contract based on the guidelines given in Chapter 3 or use the model.
8.   Think through how you would like your mentoring partnership to operate, including any limits to set (e.g., maximum amount of time you or your mentor can spend).
9.   Keep a log or diary of your interactions with your mentor. Include notes on knowledge or skills gained and commitments made. A logbook is provided in Appendix A.

### II. IMPLEMENTING THE MENTORING PARTNERSHIP

#### Plan to Do – Done

10.   Meet with your mentor by phone or in person at (time, date, location).
11.   If possible, obtain more information about him or her prior to the meeting,
12.   Prior to meeting with your mentor, review your organization's availability of training and development and see how those align with your personal tentative goals.
13.   If appropriate, arrange a three-way meeting between you, your mentor, and supervisor to clarify roles and agreements.
14.   List goals for your development.
15.   Be ready to share with your mentor any feedback you received on your strengths and areas for improvement.

16.   Be prepared to discuss the mentoring partnership in detail, including:
  - What you would like to receive in knowledge, skills, and resources
  - The roles each of you will carry out
  - Any limits (e.g., maximum time you have available) you must set for the partnership
  - Times to meet in person and by phone
  - The anticipated length of the mentoring partnership (12 months unless you agree to terminate sooner)
  - The date of your next meeting
17.   Make changes, as appropriate, in your development plan.
18.   Wait for your mentor to introduce you to people who may be helpful to you. Ask for specific ways you should (and shouldn't) approach these individuals.
19.   Study and be prepared to discuss resources loaned to you by your mentor. Keep track of them in your logbook.
20.   Agree to attend meetings with your mentor. Determine your role in these meetings.
21.   Afterwards, debrief the meetings with him, listening to explanations of what happened. (If not offered, ask for your mentor's input on the dynamics of the meetings.)
22.   Exchange information with other protégés.
23.   Continue to meet in person or on the phone with your mentor on a regular basis.
24.   Follow through promptly on every commitment you make to your mentor. If you're delayed, let your mentor know the reason immediately.
25.   Agree to contact and get assistance from individuals suggested by your mentor. Let him or her know how these interactions turn out.
26.   Learn directly from your mentor:
  - Ask your mentor to relate his or her "career story" including how decisions were made
  - Ask about specific techniques your mentor has used to work with clients, customers, colleagues, and others
  - If appropriate, observe your mentor performing the skills you want to develop
27.   Ask for constructive feedback on your ideas and performance.
28.   If appropriate, ask specific questions about the organization, including policies, procedures, culture, and politics.
29.   Ask for coaching on a presentation you must make.
30.   Complete evaluation activities:
  - If in a program, complete the periodic evaluation/feedback activities requested by your coordinator.
  - Complete reviews sent via e-mail from the mentoring coordinator.
  - With your mentor, discuss what you both concluded from the review, including any improvements you would like for the remainder of your mentoring relationship.

31.   Regularly show appreciation for your mentor's time and interest.
32.   As part of your program, regularly provide information about your mentoring relationship to your company's program coordinator.
33.   Periodically discuss your mentoring relationship with your direct supervisor.

### III. REVIEWING ACCOMPLISHMENTS AND TAKING NEXT STEPS

Toward the end of your agreed-upon time period, reflect on what you've accomplished over the entire period.

#### Plan to Do – Done

34.   Complete final evaluation activities.
- Complete evaluation/feedback activities requested by your program coordinator
  - Complete Mentoring Experience: Final Review
  - Meet in person or by phone with your mentor to discuss the status of your development activities and goals, your partnership, and any "unfinished business"
35.   Follow up your closure meeting with a note or letter of thanks.
36.   Complete any program closure activities.
37.   Continue to touch base with your mentor in the future.
38.   If appropriate, seek another mentoring partnership.

Revised (with permission), from Phillips-Jones, L. (2000) *The Mentee's Guide: How to have a Successful Relationship with a Mentor*. (With permission.) (CCC/The Mentoring Group, 13560 Mesa Drive, Grass Valley, CA.)



### PLANNING THE FIRST MEETING

Before you undertake anything significant in your life that's new, it is important to do some planning. This worksheet walks you through some steps to plan a first meeting with your mentor. Your mentor should be creating a similar worksheet; you may want to send your version of this worksheet to your mentor so you are both prepared for your first meeting.

#### Basic Background Information

My mentor's name is: \_\_\_\_\_

Nickname (if any) \_\_\_\_\_

Phone number(s) \_\_\_\_\_

E-mail address \_\_\_\_\_

Best time to call \_\_\_\_\_

What would I like my mentor to call me? \_\_\_\_\_

#### Preparing for the First Meeting

Typically, first meetings allow two people to get to know a little bit about each other, attach a face to a name and gain a bit of comfort. To do so, you need to think about what setting would feel comfortable for both of you, and plan some conversation starters – knowing that these are tools if you need them.

1. Where might I meet with my mentor where we both would feel comfortable? List a few ideas below.

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2. What are some things I could tell my mentor about myself that would help us get to know each other a little bit? What about me and my life story might be interesting and relevant to this mentor?

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3. What are some questions I could ask my mentor to get to know him/her a little bit without prying? (Write some possible open-ended questions below. Note: you want to be sure that these are questions cannot be answered with a 'yes' or 'no.')

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4. What do I want out of the mentoring relationship – what are my hopes?

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5. How can I find out what my mentor hopes to get out of the relationship – what questions might I ask?

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It is recommended that you look over your answers to this planning sheet shortly before your first meeting. You might even bring it along to offer it as a bit of a roadmap for you both to follow. Use your judgment – but remember to look your responses over before the meeting – this will make you more comfortable and relaxed. The results of your first meeting will have an important place in your mentoring logbook (Appendix A). Do not forget that you must keep track of how this, and all other meetings.

You should have prepared a preliminary Development Plan to go over during the meeting. Be careful to listen to how your mentor responds to your preparation. Ask him about the strengths or weaknesses of the plan. What does he think you need to work on? Can the mentor see opportunities for growth within your career?

## SETTING UP A CONTRACT

A good mentoring relationship starts with preparation by both parties. It is recommended that the relationships have a duration of about one year. It is a very good idea for the mentor and the protégé to have a contract for how they intend to work together. You can create your own contract that may include the following:

- Create a set of specific short term and long term objectives for the relationship
- List the preliminary developmental goals for the protégé
- Note the expectations that both of you have for the relationship
- List the necessary contributions that both must make so the relationship will work
- Create a tentative schedule for your formal meetings
- Set up a procedure for handling informal contacts between formal sessions
- Determine who has the chief responsibility for driving the relationship
- Agree on confidentiality
- Describe the differences in the role of the protégé, the mentor, and the protégé's superior

The following page provides a model mentoring contract form that can also be downloaded from the APEGGA web site. You need to click on the Mentoring tab to download it. It is very simple and will need to be edited to fit your needs. Having a contract is very important; so do not allow other topics to fill in all of the available time.

*“The beginning is the most important part of any work, especially in the case of a young and tender thing; for that is the time at which character is being formed and the desired impression is more readily taken.”*

*Plato (427 – 347 B.C.) The Republic*

**A MENTORING CONTRACT BETWEEN:**

Protégé	Mentor
Name	Name
Address	Address

I/we have both read the APEGGA Mentoring Handbook and/or other mentoring guides, and have a good understanding of the strengths and limitations of any mentoring relationship.

We will respect each other's confidence and those of our employers. We will be open and forthright with each other.

We will work towards these goals (attach list as required)

with the following specific objectives (as appropriate)

We will meet every (e.g. second Friday) on the following schedule (noon, Sept. – June, etc.) for (period of weeks/months/years).

We will review our progress \_\_\_\_\_

In the event that our personal or employment circumstances change, we will review this contract firstly to investigate its continuation.

In the event one of us remains out of contact without explanation, for longer than \_\_\_\_\_ weeks, the relationship is voided and this contract will expire.

We have discussed this relationship with our supervisors and have their support and approval.

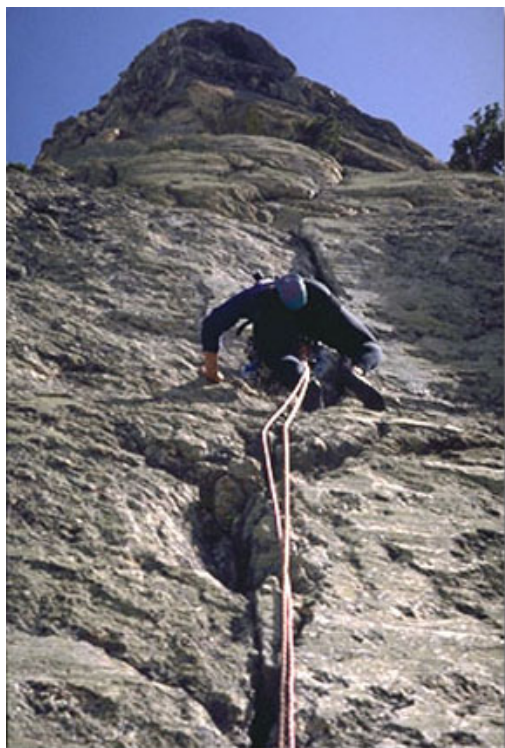
Dated: \_\_\_\_\_

Protégé's Signature: \_\_\_\_\_

Mentor's Signature: \_\_\_\_\_

*Adapted From: Appendix III, Mentoring: A Guideline for Members-in-Training and Professional Members, published by APEGGA, 2000.*

## CHAPTER 4 – THE MENTOR



The mentors in any organization are those who can help integrate others into the organization. This usually means that the mentors have experience and are willing and able to spend time and effort to develop talent in others. As a part of their mission, mentors give advice, but it is not the role of the handbook to tell you how to give advice. What is important is how the mentor can act as a catalyst with the protégé.

The purpose of this section is to distinguish and dramatize the skills of the mentors – the probes, the challenges, the inquiries and the provocative questions that will inspire thought, stimulate reflection, tap discovery and generate new aptitudes in a protégé.

### WHAT IS A MENTOR?

A mentor is any individual who provides less experienced people with support, counsel, friendship, reinforcement, and constructive example. Mentors are good listeners, people who care, people who want to help others bring out the strengths that are already there.

As a mentor, you can help aspiring young professionals find their way in the world they live in. Being a mentor provides an opportunity to give back through a form of community service within APEGGA.

### WHY BE A MENTOR?

*“There are two ways of exerting one’s strengths. One is pushing down, the other is pulling up.”*

*Booker T. Washington (1856–1915) Up from Slavery.*

The reason most given by individuals who become mentors is that they wish to give something back to their community. Another common reason is that mentors feel that they are contributing to the future of our society. Mentoring less experienced persons provides them with many benefits from improved work habits to enhanced self-image. Research shows that Mentoring really helps both parties.

Mentoring provides significant benefits to the mentor as well. Experienced mentors report that they actually feel that they get more out of the relationship than they give. While the benefits of mentoring are as diverse as the people who mentor, here are some of the themes heard from mentors. As a mentor you will be:

- Making a difference in someone’s life
- Learning about yourself
- Giving back
- Having fun

Few bonds in life are more influential than those between mentors and protégés. Mentors provide support, counsel, friendship, reinforcement, and constructive example. As a mentor you may help your protégé:

- Plan a first project
- Explore topics of mutual interest
- Set some career goals and take steps to reach them
- Learn more about your community and how to help others by volunteering
- Strengthen communication skills and ability to relate well to all kinds of people
- Make healthy choices about day-to-day life

*“Hide not your talents, they for use were made, what’s a sun-dial in the shade!”*

*Benjamin Franklin (1706 – 1790) Poor Richards Almanack.*

### ATTRIBUTES OF GOOD MENTORS

You don’t have to be brilliant or particularly successful to be a good mentor. If you want to be a good mentor, take the time to learn about your role and you will be successful. Some of the qualities of great mentors include:

- **Having a sincere desire to be involved** with a less experienced person
- **Respect for the less experienced person.** Mentors should not have preconceived ideas that the less experienced person needs to be rescued, because APEGGA protégés are professionals as well
- **An ability to listen actively** – it is relatively easy to give advice or express opinions. It is much harder to suspend your own judgments and really listen
- **Empathy.** Empathy is the ability to understand at a very deep level what the other person is going through – even without having had the same experience
- **Seeing solutions and opportunities.** Good mentors balance a realistic respect for the real and serious problems faced by their protégés. They are able to make sense of a seeming jumble of issues and point out sensible alternatives
- **Flexibility and openness.** Good mentors recognize relationships take time to develop and that communication is a two way street. They are willing to take time to get to know their protégés

### YOUR ROLE AS A MENTOR

You may be wondering what role you should play as a mentor. Defining roles can be challenging, so start with something with which you are familiar. In discussing roles, you may start by discussing something you are both familiar with, for example, a supervisor. Most of us have had a supervisor – a boss – at some time in our lives. First think about the job of a supervisor.

What are the hats a supervisor must wear in his relationship to his/her employees? A supervisor may be:

- Delegator
- Role model
- Cheerleader
- Coach
- Enforcer of Policy
- Spokesperson to senior management
- Liaison between staff and organization
- The person directly responsible for future promotion

**Comparing this to a Mentor**

<b>A MENTOR IS A(N)</b>	<b>A MENTOR IS NOT A(N)</b>
Friend	Social Worker
Coach	Parent
Motivator	Cool Peer
Companion	A banking machine
Supporter	Nag
Advisor	Parole officer
Advocate	Saviour
Role Model	Babysitter

**WHAT A PROTÉGÉ WANTS FROM A MENTOR**

When asked, most protégés say they want the mentor to help in three areas: advice, access and advocacy. Be sure to ask your protégé what he wants from you. Early in the relationship the protégé may not have a good answer to the question. Try again after several meetings to see if he has developed an answer. By the same token, it is important for the mentor to realize what he wants from the protégé. Remember every good mentor is a good listener.

*“It is with advice as with taxation: we can endure very little of either, if they come to us in a very direct way.”*

*Sir Arthur Helps (1817 – 1875)*

<b>TIPS FOR SUCCESS AS A MENTOR</b>	
<b>DO</b>	<b>DO NOT</b>
<ul style="list-style-type: none"> <li>▪ Appreciate any signs of growth</li> <li>▪ Listen carefully to what your protégé says</li> <li>▪ Ask good questions</li> <li>▪ Share your thoughts and feelings</li> <li>▪ Always be on time</li> <li>▪ Try your best to be a good role model</li> <li>▪ Learn any special rules that are part of your program</li> <li>▪ Show that you recognize the protégé’s values and lifestyle</li> <li>▪ Strive for mutual respect</li> <li>▪ Be honest</li> </ul>	<ul style="list-style-type: none"> <li>▪ Think you are going to change the world over night</li> <li>▪ Jump to conclusions</li> <li>▪ Be judgmental</li> <li>▪ Forget that communicating means listening too</li> <li>▪ Forget how important you are to your protégé</li> <li>▪ Talk about things that are off limits</li> <li>▪ Try to be a parent</li> <li>▪ Try to inflict your beliefs and values rather than demonstrating them</li> <li>▪ Use rudeness or foul language</li> <li>▪ Be insincere</li> </ul>

**WHAT KIND OF A MENTOR WOULD YOU BE?**

Before going further, it is a good idea to think back on the relationships that you have had in the past. Who in your past acted as a mentor to you? Take the time to think about a coach, a teacher or a family member who significantly influenced you when you were beginning your career. You will gain more from your future mentoring relationship if you take time, before you begin, to learn from your past. It doesn't matter whether the person was referred to as a mentor, what is important is how the person influenced you and gave you special attention. Take the time to answer the following questions:

**Personal Reflections – Mentors in your past**

1. As you think back to when you were beginning your career, do you recall in any individuals in particular? Who were the people who really made a positive difference in your life? Make a list of them below.

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1. Select two of these individuals who were particularly influential. Why do you think they took a special interest in you? What qualities did you have that made them want to spend time with you or encourage you?

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3. What was it that made each of them a great mentor? What did these important people have in common?

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4. What might these experiences teach you about how you want to be as a mentor? What lessons can you take away from these role models?

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5. After analyzing these mentoring experiences from your past, consider the following:

a. Mentoring is important to me because: \_\_\_\_\_

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b. In becoming a mentor, I hope to gain the following: \_\_\_\_\_

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c. My protégé will gain the following from a relationship with me: \_\_\_\_\_

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6. What expectations (both mine and the protégé's) do I need to discuss with my protégé?

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## THE COMMITMENT

Before proceeding with any mentoring relationship, you should consider the following points. It is appropriate to visit this list during your mentoring relationship to review your commitment.

- I am committed to drawing on my own experience (successes and failures), and learning to provide insights that I believe could assist the protégé.
- I am committed to improving upon my skills as a mentor.
- I am committed to being available to my protégé for the time/frequency agreed upon in the mentoring plan.
- I am open to learning and receiving feedback from my protégé.
- I am interested in learning from someone whose background and experiences are different from my own.

If you have concluded that you have skills and abilities that may be useful if you passed them on to a younger person and have checked off all of the above boxes, it is time for you to become a mentor.

There are several ways in which you can get involved in a mentoring relationship. APEGGA has developed a mentoring program which will be valuable for Members in Training (MIT's) and other members who want to enhance their soft skills in the business world. Consult the APEGGA web site to determine if there is a role for you. Alternatively, if there is a young person you know, either in your own company, or perhaps the child of a friend or a member of your own family who you feel could benefit from your experience, suggest a mentoring relationship with them. Be certain to explain that the nature of the relationship requires a lot of work by the protégé. The next section will provide you with a step-by-step process for starting your relationship.

## BECOMING A MENTOR

The previous sections describe what mentors are, the purpose of mentoring, and the kinds of skills that are necessary for you to develop as a mentor. This section will take you through the mentoring process itself. The APEGGA Mentoring Program emphasizes the need for the protégé to be in charge of the process. However, there are times when the mentor can take the lead if no potential protégé has approached him/her about acting as a mentor. Even though the protégé is to be responsible for scheduling of the relationship, the mentor has a major role in preparing for meetings. It is important to remember that as a mentor you should not work harder on the relationship than the protégé does.

*“Let no man say that he is a follower of Gandhi. It is enough that I should be my own follower. I know what an inadequate follower I am myself, for I cannot live up to the convictions I stand for. You are no followers but fellow students, fellow pilgrims, fellow seekers and fellow workers.”*

*Mohandas K Gandhi (1869–1948)*

## MENTOR'S PERSONAL EVALUATION

The next step is very important for both you as a mentor and for your protégé, because it helps prepare you for how you approach your new job as a mentor. Your protégé will be making a similar evaluation of his or her personal situation at the beginning of your new relationship. There are no “right” answers to these questions as they are personal, but you do need to formulate the answers.

Before starting a new relationship it's a good idea to step back from your day-to-day life and ask yourself – where am I? How am I doing? This activity will also help you give feedback to your protégé on how you see the relationship. You might consider transferring some of your more profound insights to your logbook.

### Instructions

Take time to complete this questionnaire on your own. Your protégé will be filling out a similar form. Consider discussing the results at a meeting with your protégé, talk about each question, sharing your answers with each other. Remember, the purpose of this is to help you get a real picture of where you are – if you're not honest, you'll end up with a picture of someone else and not yourself.

### Questions

Keeping in mind the goals you've set for yourself in your new relationship, answer these questions as honestly as you can:

- (1) Think back to when you were the age of your protégé. Try to recall how you behaved and what goals you had set for yourself. What were your top five strengths as a person that helped you reach the level you are at today?

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

- (2) What were my top five areas for improvement as a person – the five things I needed to overcome to reach the level I am today?

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

(3) What were the top five opportunities available to me then and how do they compare to the opportunities available to my protégé?

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

(4) What were the top five threats to my career when I was my protégé's age and how do they compare to what my protégé faces today?

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

(5) What are the five most important things I can do over the next six months to use my strengths to help my protégé overcome his/her challenges?

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

## POTENTIAL TOPICS FOR DISCUSSION

During the important first meeting there are many things that can be discussed if the meeting is planned properly. If not, you may find yourself in the uncomfortable position of being unable to control the discussion and have the meeting fail to meet your objectives and those of your protégé. Remember the protégé should lead the meeting, but if he is unable to do so, you need to be ready to help. Here are some questions you may ask yourself in preparation for the important first meeting:

- What career experiences have helped me most in my own professional development?
- What were the most important lessons learned from those experiences?
- What “truths” would I want to pass on from those lessons?
- If I were to contribute one quotation to my own book about succeeding in my profession, what would that quote be?
- What have mentors done for me and for my development? What kinds of mentoring experiences have been most helpful to me?
- If I were able, what would I change about any of the mentors I have had?
- How relevant do I believe my experiences and professional learning will be to the development of my protégé?
- As a mentor, how would I like to be remembered?
- What can I offer someone I mentor?
- What are my major strengths and talents?
- How much time, effort and enthusiasm can I realistically devote to working with someone like this?
- What do I think my protégé should contribute to the effort?

**Getting To Know Each Other** – There are many topics of conversation that can lead to a comfortable environment. Good mentors always listen more than they talk. Some topics might include

- What are the most important things you should be accomplishing on your job?
- Do you feel successful at your job at this time? If not, what is preventing you from succeeding?
- What do you like best about your job?
- If you could add variety, autonomy, and importance to your job, what would you do?
- What are your career goals?
- What have been the most significant learning experiences in your career?
- Do you feel you would benefit from any particular type of training?
- What do you think most hinders your success?
- How do you learn best?
- What knowledge, skills and abilities do you feel I possess that would most benefit you?
- What kinds of special learning or improvement opportunities do you feel I should provide or help you get?

- What do you want to know from me?
- What do you want most from me?
- What information do you have for me on how I can best help you or better understand what you need?
- What do you think we need to do to make this mentorship work?
- What do you need right now – today?
- What is the best way to give you feedback?
- What scares you?
- What makes you want to learn more?
- What talent do you feel you lack?
- What is the toughest stretch for you?
- What is your most satisfying success?

Mentors should leaf through the protégé’s section of this handbook to get an overview of their expectations. Many of the exercises for mentors are repeated in the protégé section; however, there are a number of exercises that you should know about. The guidelines for setting a personal vision and for determining objectives will be valuable to you. The Protégé’s Checklist of Tasks will give you an overview of the process they will embark upon and will give you a good idea of what to expect.

Although the protégé is expected to lead the mentoring process, if they fail to do so, it is important for the mentor to step in and provide guidance. As the protégé becomes stronger, the mentor can step back and let the protégé lead.

**PLANNING THE FIRST MEETING**

Before you undertake anything significant in your life that's new, it is important to do some planning. This worksheet walks you through some steps to plan a first meeting with your protégé. Your protégé will be creating a similar worksheet; you may want to send your version of this worksheet to your protégé so you can both prepare for your first meeting.

**Basic Background Information**

My protégé's name is \_\_\_\_\_

Nickname (if any) \_\_\_\_\_

Phone number(s) \_\_\_\_\_

Email address \_\_\_\_\_

Best time to call \_\_\_\_\_

What would I like my protégé to call me? \_\_\_\_\_

**Preparing for the First Meeting**

Typically, the first meeting allows two people to get to know a little bit about each other, attach a face to a name and gain a bit of comfort. To do so, you need to think about what setting would feel comfortable for both of you, and plan some conversation starters knowing that these are tools if you need them.

(1) Where might I meet with my protégé where we both would feel comfortable? List a few ideas below.

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(2) What are some things I could tell my protégé about myself that would help us get to know each other a little bit? What details about me and my life story might be interesting and relevant to this protégé?

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(3) What are some questions I could ask my protégé to get to know him/her a little bit without prying? (Write some possible open-ended questions below. Note: you want to be sure that these are questions cannot be answered with a 'yes' or 'no.')

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(4) What do I want out of the mentoring relationship – what are my hopes?

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(5) How can I find out what my protégé hopes to get out of the relationship – what questions might I ask?

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It is recommended that you look over your answers to this planning sheet shortly before your first meeting with your protégé. You might even bring it along to use as a bit of a roadmap for both of you. Use your judgment – but remember to review your responses before the meeting – this will make you more comfortable and relaxed. The results of your first meeting will have an important place in your mentoring logbook. Do not forget that you must keep track of this first meeting , and all other meetings (Appendix A).

You should expect that your protégé will have prepared a preliminary Development Plan to go over during the meeting. Be careful to listen to your protégé regardless of your own preparation. Ask him/her about their strengths or weaknesses. What do they need to work on? How do they see opportunities for growth within their careers? They should be prepared to talk about their goals.



### **USE THE “10-60-90” PRINCIPAL**

The “10-60-90” principal instructs people so they will learn and grow to their greatest potential in the least amount of time. When you tell an adult how to do something, 10 per cent of what you say will be remembered. If you show an adult how to do something, 60 per cent of what you show will be remembered. If you do something with that same person, 90 per cent or more will be remembered. There are three steps to make this statement extremely effective as a mentoring tool. Firstly, make your protégé successful; secondly, show him the success, and, thirdly, make sure he understands why he is successful.

### **INTRODUCING YOUR PROTÉGÉ TO OTHERS**

One of the important roles of a mentor is to introduce the protégé to other individuals who may be able to help develop his skills and meet his goals. In choosing who is a likely candidate for an introduction, it is important to assess your own strengths and weaknesses and choose a person who has specific skills that will enhance yours. The purpose is not to lighten your load as a mentor, but to broaden the knowledge base available to your protégé.

Opening your Rolodex to your protégé is not advisable until your relationship has developed and you know your protégé well. It is wise to maintain your relationship on a professional basis without visits to your home – unless there is a particular skill your protégé might gain from the experience. Business lunches, on the other hand, are an excellent way to provide casual exposure to your peers for your protégé.

Enjoy your role as a mentor and guide for your protégé.

*“The basic rules of mountaineering are: push yourself all the way to the limit and then leave a margin for safety. There is a kind of mixture of boldness and prudence in that. It breeds self-discipline. And the next rule is: No whining.”*

*John Muir, Mountaineer*



## CHAPTER 5 – WORKING TOGETHER

### BUILDING THE RELATIONSHIP

The creation of a mentoring relationship means a great deal more than just going to meetings and having casual chats about the future. Statistics show that most mentoring relationships fail, with as many as one third ending when the protégé changes jobs/positions. Here are some suggestions that can help keep the relationship on the road to success.



1. Get the relationship off to a good start. The protégé should be involved in the selection of a mentor. If a mentor is “given” to the protégé in a structured program, the protégé should not be passive and accept just anyone.

2. Both mentors and protégés should be assertive if either feels that there is a mismatch. It is better to pull the plug on a relationship at the outset than to struggle to maintain a relationship that has little value to either party.

3. The first meeting is extremely important and should be structured with an agreed-upon agenda. The protégé must have clear objectives to discuss with the mentor and be prepared to discuss what is needed to be successful in his/her career. It is also important to clearly define what is expected of each party; the frequency and length of meetings; the boundaries around the relationship (what will and will not be discussed); and the length of the relationship.

4. The relationship will be successful if you meet your commitments; respect the time restraints that occasionally interrupt your expected schedule; confine yourself to the issues set out in the first meeting; never

betray confidences; and, always show your appreciation for the time spent on the relationship.

### SUGGESTED ACTIVITIES

There are many activities that mentors and protégés can work on together that will help reach specific goals. No activity should be undertaken simply as something to do; activities must be directly related to the reasons why the relationship was created. With that in mind, here are some potential activities that a mentor might assign:

1. Suggest reading a specific paper or article, or attend a lecture, short course or seminar that relates to the goals of the protégé
2. The protégé and mentor attend a business reception together with pre- and post-reception discussions
3. The protégé prepares and gives a presentation related to his or her work and the mentor will review and discuss the aspects of the work
4. The protégé writes letters or brief reports that the mentor reviews and discusses with the protégé

The purpose of any development project is to expand the protégé’s understanding of the profession, to develop his or her skills and help solve problems. It is very important for the mentor to remember that the main purpose in creating a project is to develop skills and increase confidence, not to produce a product or directly benefit the mentor. It is important to begin discussing the potential for projects at the outset of the relationship.

### DOING PROJECTS TOGETHER

As the mentoring relationship develops over the months it may be apparent that the protégé’s development might be aided by work on specific projects. Mentors, however, must remember that the idea of assigning a project is not to get your own work done. The idea is to give the protégé a new experience that will help him or her reach an important goal.

Whether you assign projects to your protégé or not is something that is negotiated between the two of you. If you choose to have projects, try to avoid assigning a project that will directly benefit your own job. If you do decide to assign a project, here are some guidelines on how to keep track of the process. These guidelines are basic project management and can be useful in any project.

**Here, try this... (for pre-assignment discussion)**

- This is an assignment I would like you to take on. This is what the results should look like....
- What do you feel your target should be on this project?
- What is your production goal?
  - What time line should you have?
  - What will it take to get it done within that time line?
  - What do you need to get started?
  - What past project or experience will help you in working on this?
- Who do you need to work with you on this?
- Who do you need to coordinate with?
- What preparation should you be making?
- How long will it take you to complete your preparations?
- What resources should you gather before beginning?
- What external resources will you need?
- What internal resources will you need?
- What is your plan of attack?
- What is your learning goal?

**Let's really look at this...**

- What's the point of trying it that way?
- What other ways are there to make it work?
- What will you learn from trying it that way?
- What assumptions are you making about the project?
- What are you most confident about?
- What is scaring you the most?
- What do you need to know from me?
- What do you want from this experience?
- What obstacles can you identify at this point?
- What will be your first step?

**Refining the plan...**

- What efficiencies should you try to achieve as you develop the project?
- How will you monitor your progress?
- How should I be involved in the mentoring process?
- How will you know if you need help?
- How often should we communicate during the project?
- I need an "early warning system". How will you notify me of problems that arise?
- What challenges do you foresee to "your way of thinking" in performing this activity?
- How will this assignment challenge you to alter your way of thinking about projects?
- How will you flag your need to think "out of the box" as the project proceeds?
- What will happen if you do it the way you plan?

**Getting help...**

- How can I help you in this?
- How will you use the help of others?
- What must be in place before you can begin?
- How will you evaluate your progress?
- How will you measure your success?

**This is what I want you to accomplish...**

This is my suggestion for what might work best.

- Watch out for this pitfall. \_\_\_\_\_
- This pitfall has caused \_\_\_\_\_ in the past.
- Be careful with him or her.
- If you need me to intervene with \_\_\_\_\_ let me know; but I will want an analysis of why and how.
- Tell me the part of my suggestion that you think might not work.
- If you take the approach you are suggesting, it will probably have \_\_\_\_\_ (this) \_\_\_\_\_ effect.
- Let's brainstorm how to do that; I've got some ideas.
- This is the reason that I want you to work on this. \_\_\_\_\_
- This is what I think you will gain from working on this. \_\_\_\_\_
- This is what success on this will do for us. \_\_\_\_\_
- These are the costs for failing on this. \_\_\_\_\_

Be sure to track any projects in your logbooks. It is very important to log all of the steps taken and the results, both good and bad.

**POTENTIAL RELATIONSHIP PROBLEMS**

In every relationship there are times when it is important to review how things are going. By now you have learned that having a mentoring relationship requires a great deal of effort. Like all human interaction, mentoring carries a certain amount of risk. If you are aware of what these risks are, you have a better chance of avoiding problems.

**Possible Problem #1 – Not Enough Time.**

Everyone is short of time. Even the most casual mentoring relationship requires time. Intensive relationships require even more time: time to plan, time to meet, time for sending and answering e-mails, time for telephone conversations and time for thinking.

The problem is not just a problem for mentors who don't have enough time. A protégé whose mentor is very generous (and/or demanding) with his/her time can be run ragged. It is very important to decide before the relationship begins how much time will be devoted to the relationship.

### **Possible Problem #2 – Personal Problems.**

If a mentor runs into difficulty in his or her own life, either personally or on the job, it affects the protégé directly. If the problem is on the job, it may affect more than just the direct relationship – it may affect the protégé’s job prospects. If the personal problems restrict the mentor’s time to the extent that the relationship is suffering, the protégé is well advised to look for a new mentor.

If the protégé runs into serious personal or job difficulties, it can result in a serious increase in the amount of time the mentor needs to be with him or her. The mentor must make sure that he is not spending more time on the relationship than the protégé. Occasionally, a mentor may discover that the protégé is just not interested in doing any more than absolutely necessary to get by. This is more likely to happen in corporate programs where the mentoring pairs are selected, rather than in a program where the protégé seeks out a mentor. If a relationship is not working, it is best for both the mentor and the protégé to end the relationship. If you are following the process outlined in this handbook, you will have negotiated at the beginning how to end the relationship. Always end a relationship on a friendly note; this is extremely important. Always leave a door open.

### **Possible Problem #3 – Unrealistic Expectations**

Being a mentor or a protégé for the first time will cause some concerns regarding just how much mentoring is enough. A mentor may feel that s/he is responsible for what happens to a protégé while the protégé may want a more distant relationship. If the mentor has a specific career move that seems a great way for the protégé to succeed, it may conflict with the way the protégé sees his or her own future. This may cause a case of guilt in the protégé if he feels that the mentor is really going out of his way to help.

Another unrealistic expectation occurs if a mentor *expects* the protégé to do as he suggests. These problems can be avoided if the goals and objectives of the protégé are defined and discussed in detail at the beginning of the relationship. Do process checks from time to time to see if the expectations of the mentor and the protégé are reasonable.

### **Possible Problem # 4 – Expectations of Failure**

Individuals generally perform at or near the level expected of them by others. Mentors with high expectations of the protégé inspire achievement. If a mentor has only accepted the role of a mentor because he sees it as a career move, and doesn’t care about the process or the protégé, the protégé begins the relationship with at least one strike against him. Expectations of failure can be a self-fulfilling prophecy.

The best solution to this problem is to avoid starting it. If a mentor has a genuine feeling that a potential protégé will not be successful, it is incumbent upon him/her to decline participation (in a structured program) or explain to the potential protégé that s/he should find a different mentor. When declining a protégé who has selected you, always try to suggest someone else who might do the job better.

### **Potential Problem # 5 – Protégé’s Feeling of Inferiority**

It is common for protégés to do a little comparative analysis while working with the other protégés. If the protégé feels that he is not moving ahead as quickly as others in the group, it may lead to feelings of “failure”. Indeed, if the mentor selected for the protégé is less dynamic than other mentors, it can lead to the protégé’s feeling less important. If the mentor is a superstar in the company, it can cause strong feelings of inferiority in a protégé.

It is very important for the protégé to learn to avoid this problem by changing how he judges success. This is all part of setting up the relationship. Remember that good planning and clear procedures greatly strengthen mentoring relationships and help avoid problems and pit-falls.

## RELATIONSHIP REVIEW

### “How is it going?” Worksheet

Instructions: This worksheet is intended for protégés and mentors to complete and share after working together for approximately 3-4 months. It’s time to do a “checkup” if you have already done goal-setting, have gotten to know each other reasonably well and have done a variety of activities together. You can also use this worksheet when things get rocky and you feel some honest mutual feedback might help.

My mentor/protégé and I have been meeting for \_\_\_\_\_ (amount of time).

I feel we have established enough trust between us that we can work well together.

Yes  No  Not Sure

If he’s upset or unhappy with our relationship, or me, I’m confident my mentor/protégé would talk to me about what’s going on.

Strongly Agree  Somewhat Agree  Neutral  Somewhat Disagree  Strongly Disagree

If I were upset or unhappy with my mentor/protégé or our relationship, I would feel comfortable talking with my him about what’s going on.

Strongly Agree  Somewhat Agree  Neutral  Somewhat Disagree  Strongly Disagree

I feel we’ve made real headway in setting goals and take steps to implement them.

Strongly Agree  Somewhat Agree  Neutral  Somewhat Disagree  Strongly Disagree

Five things I feel are going great in our mentoring relationship are:

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

4. \_\_\_\_\_

5. \_\_\_\_\_

One thing I wish I could change about how we interact with each other is...

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If I had to guess what my mentor/protégé likes best about how we work together it would be...

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Sometimes I think my mentor/protégé wishes I would...

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After you've each completed this worksheet, consider devoting one of your meetings – or part of one – to sharing your responses. Remember that no relationship is perfect and constructive feedback is healthy and can help strengthen your connection.

Compare your responses. Be sure to value both situations in which you agree and those in which you disagree – it's all good information. After you've finished sharing, talk about next steps – what you each can do to strengthen the “good stuff” and overcome any difficulties. Commit to a plan of action together.

### **GIVING FEEDBACK**

There are times in the mentoring relationship when the mentor sees a need to suggest changes to his protégé's behavior. It may be a simple characteristic such as a consistent improper use of a word or phrase to career limiting characteristics such as an inability to eat properly in a restaurant. Any behavior the mentor sees and considers inappropriate is potentially a topic for feedback.

There are, however, ways to give feedback that can ruin a good relationship or conversely, improve it. Constructive feedback should never be given on the spur of the moment. It must be planned. The following worksheet provides a format for planning what to say and how to say it.

### **FEEDBACK WORKSHEET**

#### **Step 1: Identify the behavior for which you want to give feedback.**

I would like to give my protégé constructive feedback on...

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Describe the focus of your feedback in terms of behavior. I have observed/noticed....

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**Step 2: Describe the effects of the behavior.**

When you do \_\_\_\_\_  
\_\_\_\_\_

**Step 3: Describe the change in behavior you are recommending.**

Double-check your statements to make sure you are not using judgmental language or making generalizations. Then begin to deliver the feedback keeping the following tips in mind.

- Pick your time and place – it is a good idea to give feedback when you are both in a good frame of mind and in a private setting. Do not attempt to give feedback in the heat of the moment, particularly if you are upset or angry. Wait until you are both calm.
- Give your protégé a “heads up” that you want to give him some feedback so he is prepared to listen.
- Remember to listen and to be empathetic, but do not be sidetracked with apologies or excuses. Acknowledge what your protégé is saying, but stay on track with the delivery of the feedback.
- Get feedback on your feedback. Ask your protégé how he feels about the experience – what worked and what you could do better.

**REFLECTIONS**

Think back to your childhood – who around you gave you feedback on how you were doing – in school, in the family, or at sports? Write their names below.

\_\_\_\_\_  
\_\_\_\_\_

How did their feedback – whether it was called discipline, or advice, or coaching, or scolding – feel? Write down words that describe how you felt about the feedback you received from the people listed above, when you were a child.

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Think about bosses you have had in your career – what did they do to help you look at your performance and determine how to improve it?

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Think of the person in your life who was the very best at helping you see how you were doing and how you might improve without shaming you or making you feel defeated – write his or her name below, and then write how s/he did it. What do you remember about his/her approach? Do you think you might try that style with your protégé?

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### IF THINGS GO WRONG

If it appears that something is wrong with your mentoring relationship, the easiest thing to do is walk away, but while walking away is easy, it always inappropriate and unprofessional. Think of the amount of time you have already invested in the relationship up to the point that you contemplate quitting. Also, consider how others, both inside the mentoring program and in the profession, may perceive your actions.

As mentioned many times in this handbook, if you plan your relationship carefully, there will be little room for problems. You will have planned how to end the relationship if either the mentor or protégé is not comfortable with the arrangements, but ending the relationship should be a last resort. You need to determine logically and quietly whether the mentoring relationship can be saved, whether it is worth saving, and whether the time, energy and emotional costs will result in a win-win situation. This is not easy. The following worksheet is designed to help your through the process of deciding how to solve your mentoring relationship problem.

*“The greatest problem in the world could have been solved when it was small.”*

*Witter Bynner*

### PROBLEM SOLVING WORKSHEET

#### What’s the problem?

- Give me your view on the situation
- What is the history?
- How long has this been a problem?
- When did you first define it as a problem?
- What part did \_\_\_\_\_ play in it?
- Tell me your assessment of \_\_\_\_\_’s part
- Why is this a problem?
- What is the real problem?
- What are the costs and benefits?
- What price are you (others, and your organization) paying now because of the problem?
- What is the cost of solving it?

- Would solving it be worth the cost?
- Where is your leverage for solving the problem?
- Which alternative gives you the most leverage?
- What aspects of the situation point toward your working through it successfully?
- What forces hinder you?

**Step 1: Define the problem**

What is the problem you want to work on? Write it down as you define it now.

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Ask yourself: Why is this a problem? Is it a real problem or a symptom? Is your problem really a proposed solution to the real problem? Write your thoughts on these questions.

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Rewrite your definition of the problem.

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**How to go about solving the problem...**

- What outcome do you want?
- How will you know when you have it?
- What is keeping you from having it today?
- What is reasonable to achieve?
- What must you do to accomplish this?
- What would \_\_\_\_\_ have to do?
- What would you say to \_\_\_\_\_ to get him/her to see their part in the problem?
- What would \_\_\_\_\_ answer if you said that?
- Picture the situation as you would like it to be. If it were working perfectly, how would it look?
- What will you do first?
- What resources do you have to help you?
- What will you do if you run into a problem in trying your plan?

- Why don't you do that now? What is stopping you?
- What will you say to \_\_\_\_\_?
- Do you have a "plan B"? What would it be?
- How might I help you? What do you need?
- How are you contributing to the problem?
- What have you learned about yourself by grappling with this issue?
- Step 2: Define success in solving the problem
- If you were to succeed in solving the problem you have just defined, what would success look like? Describe what would happen if you were successful.

**What have you done to help?**

- Have you done anything to confront the problem?
- Why not? (If the answer is "no" or "kind of")
- What could you have done?
- What would have happened if you had?
- What is the best thing that would have come from it?
- What is the worst thing?
- This may take you out of your comfort zone, but how would you confront \_\_\_\_\_ on this issue?

**Step 3: Generate alternatives**

What are some ways you could solve your problem and achieve the success described? Come up with a list of choices – do not edit yourself, just think of as many as you can.

_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

Which of these do you like best? Circle three to five of the best.

**Suggestions...**

- This is how I envision the possibilities
- How about \_\_\_\_\_? He might be of real help.
- I agree with your approach
- What if you did \_\_\_\_\_, in addition to that?
- What if you did as you are suggesting, but positioned it this (a different) way?
- Would you do it this way \_\_\_\_\_ or that way?
- What would happen if you \_\_\_\_\_?
- This is the way I have approached similar problems in the past

- Why are you suggesting that? Do you believe that will work best? What would be the best thing that will result from that?
  - I think what you are suggesting will run into this difficulty. \_\_\_\_\_  
Because \_\_\_\_\_ I think you will need to achieve \_\_\_\_\_ in the end. This is the bottom line
  - Tell me how you disagree with me. Negotiate with me.
  - We need to solve the problem by \_\_\_\_\_.
  - How will you do it?
- 
- 
- 
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**Step 4: Evaluate alternatives**

The next step is to pick a “Plan A” and a backup “Plan B” for solving your problem. Here are some things to consider in picking from your list of choices.

- How much time will this take?
- Will it cost any money?
- Are there any downsides?
- Will the option yield other benefits beyond solving the problem?
- What just seems to be the best?
- Who else will be affected?

Once you have considered all of this, write the letter “A” beside the first choice and “B” beside the second best choice.

**Step 5: Agree on action**

If you want to follow through on this approach to solving the problem, it is important to decide what you need to do and when. Mentor and Protégé should do this together.

My “Plan A” is to...

To accomplish this, I will:

TASK	BY WHOM	WHEN

**Step 6: Schedule follow-up**

Set a time to check back with each other to see how the problem solving is going – or how it went.

We will check on progress on \_\_\_\_\_ [date].

Questions to discuss:

What did or did not work in solving the problem?

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Knowing what you know now, what would you do if the problem happened again?

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## CHAPTER 6 – MENTORING AND THE WORKPLACE

### THE CHANGING WORKPLACE

Many mentors and protégés will find themselves participating in APEGGA's Mentoring Program while employed by a for-profit business. With this in mind, it is worthwhile considering the roles of the mentor and protégé in relation to their place or places of employment. Some corporations have existing mentoring programs that may dovetail with the needs of APEGGA mentors and protégés. This chapter provides some ideas related to mentoring in the workplace and specifically in the for-profit corporate environment.

Whether mentors received a few helpful tips or were taken under someone's wing, most of them will have benefited from formal or informal mentoring at some point in their careers. Today, mentoring has evolved in the workplace to be less about bosses grooming their handpicked successes to being more about employees' overall career growth. With the steep learning curve in most technical organizations, leveraging the knowledge and experience of veteran staffers is especially helpful in speeding along the development of newcomers.



Corporations have undergone immense change in the past decade due to increased competition in the global marketplace. These changes are having a major impact on the role of managers. Most Fortune 500 and Fortune 100 companies have restructured in an attempt to become more competitive with hundreds of thousands of employees laid off as a result. Now managers are forced to meet greater demands for productivity with fewer resources and shorter planning cycles.

Employees are expected to go the extra mile and work anytime, anywhere with loosely defined job descriptions. In the past an employee could count on being with the same company for his/her entire career – 30 years or more. Now if a person is with the same company for 10 years, his/her motivations are suspect.

Many companies have been involved in “reengineering” efforts in an attempt to improve their business processes. Managers of the future will have to know how to create a culture of continuous improvement, or what some specialists call “the learning organization”, in order to remain competitive. In flattened organizations, however, there are fewer middle managers to do the work.

The leaders that remain in the companies must learn to shift from a control and command style to one of facilitating and mentoring. Managers who once felt they must know where, when, what, and how employees are doing will be forced to trust and empower their employees. Managers of today and tomorrow may have responsibility for business results without having direct control over the people who must achieve those results. Managers increasingly will have the responsibility to train others and act as mentors in order to empower workers and will need to find a match between the career interests of individual workers and the needs of business.

The long term implications of these trends for the future require that managers' roles will shift. Managers will need to shift:

FROM	TO
Controlling and commanding	Mentoring and empowerment
Creating conformity	Valuing diversity
Working through chain of command	Making decisions at the lowest levels
Narrow job descriptions	Broad job design
Leading teams	Teams leading themselves
Developing and rewarding through upward mobility	Developmental assignments and lateral mobility
Domestic focus	Global focus
Using formal power	Using influence
Using imposed systems of measurement and controls	Letting employees determine both
Resisting change	Leading change

Hopefully, as a result of these trends, work will become more satisfying. Workers will have a greater sense of closure and accomplishment from their jobs as they perform complete tasks and have more control over decisions that affect their jobs. In addition, they will have more power to affect the organization in a significant way. These trends can have positive consequences if managers learn how to create a culture of continuous improvement, understand their new roles, develop employees, and mentor effectively. Mentoring is a process of building a relationship and a working environment that enhances the development of skills and performance of one or both parties. Mentoring must be supported and reinforced by the management system and the organizational culture.

### **EFFECTIVE MENTORING IN THE WORKPLACE**

Organizations can expect many benefits from mentoring. Staff will grow, mature and gain confidence. They will gain the following:

1. Awareness of organizational policies and culture
2. Appreciation of networking
3. Proactive approaches to their tasks
4. Eagerness to learn
5. Movement towards "expert" status
6. Attitude of "advocacy"



## ROLE OF THE IMMEDIATE MANAGER

Many managers state that they act as mentors to their “people”; however, the direct manager is more likely to be in the role of a coach rather than a mentor. The differences between coaching and mentoring can be illustrated as follows:

COACHING	MENTORING
Focuses on tasks	Focuses on processes
Usually short term	Usually long term
Explicit feedback	Intuitive feedback
Develops skills	Develops capabilities
Driven by the coach	Driven by the protégé
Shows where you went wrong	Helps you figure it out for yourself

A direct manager is a coach. It is his/her responsibility to focus on the work that must be done and assure that the worker knows how to do the tasks required to do the work. It is very important to include the direct manager in a mentoring relationship. There are three ways a manager can be involved in the mentoring relationship:

- 1) The manager is told about the relationship but does not meet with the mentor and has a somewhat arms- length relationship. The mentor may answer direct questions about the development of the protégé within the bounds of their confidentiality agreement, but does not offer comments to the manager.
- 2) The mentor, protégé and manager meet together to discuss the goals and objectives of the mentoring relationship, discuss training plans and other development potential. After the initial set-up of the relationship, the manager steps back, and has little further involvement.
- 3) The mentor, protégé and manager meet frequently to work together to help the protégé reach his/her goals. The choice of style of mentor/protégé/manager relationship that will work best depends on the personalities of the individuals and the choice should always be made by the protégé who is driving the relationship. As a general rule, the protégé should include his direct manager in the mentoring relationship as much as possible because he is a key player in career development.

## MAXIMIZING THE BENEFITS OF MENTORING TO EMPLOYERS

Some businesses may wish maximize the benefits of the APEGGA Mentoring Program to their organization through the following actions:

- **Manage the entire mentoring process to ensure consistency and quality.** Though the content of individual mentoring sessions should always be confidential, the mentoring process itself needs to be managed to ensure that the protégés and the mentors are following the appropriate process and leveraging best practices.
- **Prepare protégés in advance for mentoring and don’t force mentoring on anyone.** Mentoring remains a relatively new development technique and people may not understand how the process can help them become better professionals. The sooner they understand the process, the sooner they will see results.

- **Provide mentoring with strong organizational support.** Those being mentored should receive encouragement and support from their immediate managers. Also, mentoring should be conducted in the context of other developmental efforts such as competency development, assessments, mentoring and leadership workshops.
- **Allow each mentoring relationship to follow its own path.** A major difference between mentoring and training is that mentoring allows the individual to determine what works best for him at a very personal level. Mentors need wide latitude to work with “the whole person” and help each protégé be more effective as a person as well as to be more effective as a business leader.

### MENTORING COSTS AND RETURN ON INVESTMENT (ROI)

With so many intangible benefits, the bottom-line effects of a mentoring program can be difficult to quantify. ROI is most clearly demonstrated by examining productivity and turnover rates before and after implementing a mentoring program. According to the Meta Group, when mentoring leverages the organization’s skills and productivity, employee morale can increase by 25 per cent. The ROI for mentoring can be calculated using various methods, and a return for the investment can be found in numerous locations within an organization. An ideal way to examine the ROI for mentoring is to look at the protégé, mentor and the organization.

- With protégés, ROI can be calculated through skill and knowledge development that directly impacts productivity.
- With mentors, ROI can be calculated through the sharing of knowledge and expertise.
- With the organization the ROI can be calculated through retention, attracting talent, savings on training and development costs, and creating a competitive work environment.

Regardless of where you look for the ROI on mentoring, the formula for calculating the ROI is generally the same. The following is a sample method for calculating ROI of a mentoring program in the area of retention.

- A. Calculate the total costs of implementing and running the mentoring program.
- B. Determine the current level of spending associated with the cost to the company each time an employee leaves the company during the year.
- C. Multiply the amount “B” by the number of employees that leave during the year.
- D. Subtract “A” (original investment in mentoring) from “C” (turnover costs).
- E. Divide “D” by “A” and multiply times 100 to determine the ROI percentage.

(Please note: this style of calculation does not factor in changing business conditions, manpower pool, competition and other factors, it is strictly a measure of mentoring.)

Statistics show the positive influence of mentoring on protégés, mentors and organizations. These statistics are grouped into four categories that effect every organization or individual.

**Promotion:** 75 per cent of executives point to mentoring as playing a key role in their careers; and 44 per cent of CEOs list mentoring programs as one of the three most effective strategies to enhance women’s advancement into senior management. (Source: American Society of Training & Development – ASTD)

**Productivity:** Managerial productivity increased by 88 per cent when mentoring was involved, versus only a 24 per cent increase with training alone; 71 per cent of Fortune 500 companies use mentoring to assure learning occurs in their organizations. (Source: ASTD)

**Development:** More than 60 per cent of college and graduate students listed mentoring as a criterion for selecting an employer after graduation (Source: MMHA); 76 per cent of *Fortune's* top 25 companies offer mentoring programs (Source: *Fortune Magazine*); 96 per cent of executives say mentoring is an important development tool (Source: Account Temps).

**Retention:** 77 per cent of companies report that mentoring programs were effective in increasing employee retention; 35 per cent of employees who do not receive regular mentoring look for another job within 12 months (Source: ASTD).

When all is said and done, there can be little doubt that mentoring is not only good for the professions but also benefits mentors, protégés and the organization.

## REFERENCES

All reference materials used in the creation of this text can be found on APEGGA's Mentoring web site under the heading of resources. That location also gives a listing of web sites that will provide help to potential mentors and protégés.



## APPENDIX A – MENTORING LOG

Directions: Read through this Log before your first meeting with your protégé and fill in what you can. Be sure to structure your first meeting so that you will be able to answer most of the questions after the meeting. Maintain the log by describing each meeting.

### 1. Background information on the protégé/mentor:

Name \_\_\_\_\_

Preferred name or nickname \_\_\_\_\_ Date of employment \_\_\_\_\_

Job Title \_\_\_\_\_ Department \_\_\_\_\_

Address \_\_\_\_\_

Telephone: (daytime) \_\_\_\_\_ (evening) \_\_\_\_\_

Fax number \_\_\_\_\_ Cellular \_\_\_\_\_

Educational background \_\_\_\_\_

Professional or work background \_\_\_\_\_

Manager/Supervisor \_\_\_\_\_ Phone \_\_\_\_\_

Other information \_\_\_\_\_

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**2. Mentoring Partnership Will Cover Period** \_\_\_\_\_ to \_\_\_\_\_

**3. Protégé's Tentative Career Plans and Ideas:**

(Note where the protégé is now and what he is considering doing later. Protégé, include your development plans.)

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**4. Assistance Needed By Protégé:**

(Mentors, ask protégé for this, and add ideas based on your experience. Refer to Development Plans. Protégé list what you need.)

- Immediate: \_\_\_\_\_

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- Longer term: \_\_\_\_\_

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**5. Specific Assistance I Can Provide as a Mentor or Need as a Protégé:**

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**6. Other Individuals or Resources that May Be Helpful:**

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**7. My Time Limits or Constraints on this Partnership:**

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**8. How I Will Know That My Protégé/Mentor And I Have Been Successful In Our Efforts:**

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**9. Log of Meetings and Other Activities with Mentor/Protégé:**

**1st** \_\_\_\_\_  
(Date, time and location)

Purposes/Assistance \_\_\_\_\_  
\_\_\_\_\_

Comments After \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Follow-up Steps

Mine \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Mentor's/Protégé's \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**2nd** \_\_\_\_\_  
(Date, time and location)

Purposes/Assistance \_\_\_\_\_  
\_\_\_\_\_

Comments After \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Follow-up Steps:

Mine \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Mentor's/Protégé's \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_



**3rd** \_\_\_\_\_

*(Date, time and location)*

Purposes/Assistance \_\_\_\_\_

Comments After \_\_\_\_\_

Follow-up Steps:

Mine \_\_\_\_\_

Mentor's/Protégé's \_\_\_\_\_

**4th** \_\_\_\_\_

*(Date, time and location)*

Purposes/Assistance \_\_\_\_\_

Comments After \_\_\_\_\_

Follow-up Steps:

Mine \_\_\_\_\_

Mentor's/Protégé's \_\_\_\_\_

