

# MENTORING Pocketbook

*4th Edition*

For mentors and mentees,  
a pocketful of tips and  
techniques to maximise the  
benefits of this highly  
effective human resource  
development process

**Geof Alred  
& Bob Garvey**



"The Mentoring Pocketbook is my well-used and trusted text that I recommend to all new mentors and mentees. It is a versatile, pragmatic and educative book for anyone looking to engage with mentoring informally or through an organised programme. The content is both helpful for the participants and managers but also HR/L&D/OD professionals, to explore best practice content in designing and developing internal mentoring. To me, reading this pocketbook is a pre-requisite for anyone becoming involved in mentoring!"

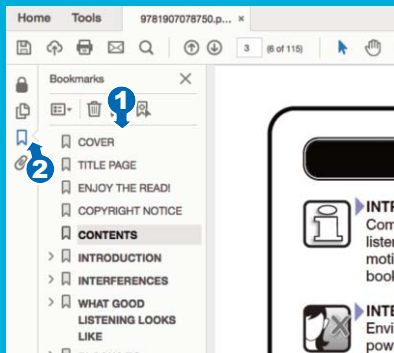
**Lis Merrick, Managing Director,  
Coach Mentoring Ltd**

"Mentoring is probably the most powerful developmental process people can experience. And when it works, it develops two for the price of one. The Mentoring Pocketbook is a no-nonsense primer for the first-time mentor or mentee."

**Prof. David Clutterbuck,  
Co-founder, The European  
Mentoring and Coaching  
Council**



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# MENTORING Pocketbook



# Enjoy the read!

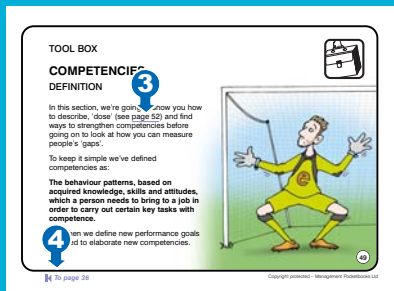
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# CONTENTS



## ▶ HOW TO USE THIS POCKETBOOK 5



## ▶ MENTORING IN ORGANISATIONS OF ALL KINDS 7

Uses of mentoring and how it fits within the context of managing change and mission/value statements



## ▶ THINKING ABOUT MENTORING 17

Identifying mentor and mentee, the manager's position, and distinguishing between mentoring, coaching and appraisal



## ▶ MENTORING IN ACTION 35

A 3-stage process and framework for mentoring in action covering the mentor and mentee perspective



## ▶ WORKING TOGETHER 75

Commencing, maintaining and concluding the mentor-mentee relationship



## ▶ MENTORING SCHEMES 91

Key factors in designing, developing and promoting a mentoring scheme, including evaluation and support, plus tips for both mentors and mentees



## ▶ ISSUES & QUESTIONS 119

Common queries answered



## ▶ FURTHER INFORMATION 125

“ *Mentoring is a distinct relationship where one person (the mentor) supports the learning, development and progress of another person (the mentee). A mentor provides support by offering information, advice and assistance in a way that empowers the mentee.* ”

**Julie Starr**  
**The Mentoring Manual: Your step by step  
guide to being a better mentor**  
Pearson Business, 2014

## HOW TO USE THIS POCKETBOOK



This book is an internationally informed resource and support for those involved in mentoring at work and in groups and organisations of various sorts. It will be useful to anyone who is interested in professional and personal learning. It is aimed mainly at mentors, but mentees and scheme co-ordinators will also find it helpful. It can be used in a number of ways:

- **As an outline resource book:** it gives you a clear idea of how to design and manage schemes, prepare for mentoring, conduct mentoring sessions, maintain the mentoring relationship and evaluate mentoring
- **For reflection:** it is a resource to consult, particularly when approaching a mentoring session or when you want to reflect, after a session, about what has gone on
- **To stimulate your development as a mentor:** the book provides a challenge and stimulus to reflect upon your role within your organisation, and what you value as a member of your organisation

Continued ...

## HOW TO USE THIS POCKETBOOK



- **To stimulate your development as a mentee:** it may help you to develop your career and yourself personally
- **For discussion:** the book can be a focus for discussion with mentees in mentoring sessions and with other mentors in your network; it may also provide a focus for discussion with your line manager
- **To read selectively:** the book is designed to be read in any way which you feel appropriate, either the sections relevant to you or from cover to cover

**Note** Where this book talks of the 'mentee' others sometimes use the words 'protégé', 'mentoree' or 'learner'. 'Mentee' is our preferred term.





# MENTORING IN ORGANISATIONS OF ALL KINDS

## MENTORING IN ORGANISATIONS OF ALL KINDS

### WHERE IT IS FOUND



Mentoring has become recognised worldwide as a highly effective learning and development process. It is present in every continent in the world and is truly global. Examples can be found around the world in many diverse organisations from public to private sector, from service to manufacturing industries. There are mentoring programmes in:

- Manufacturing industries
- Retail businesses
- The health sector
- Airlines and travel businesses
- Financial services
- Tourism and leisure industries
- Educational institutions
- Petro-chemical industries
- Public sector and government
- Charities, not for profit and social sector
- The armed and emergency services
- Non governmental organisations (NGOs) and social enterprises
- Small businesses and start-ups
- The arts and creative industries

## MENTORING IN ORGANISATIONS OF ALL KINDS

### WHY MENTORING & WHY NOW?



Why is mentoring so widespread in diverse settings and in many societies, cultures and countries?

#### **In business organisations, mentoring supports:**

- Knowledge development and knowledge sharing
- The development of effective learning environments
- Value added performance and productivity development
- The changing role of managers – from command and control to challenge and support
- People in changing situations
- Stress management initiatives
- Management, capability, talent and leadership development
- Creativity and innovation
- Problem solving skills development
- Strategic decision making

## MENTORING IN ORGANISATIONS OF ALL KINDS

### WHY MENTORING & WHY NOW?



**In wider society, mentoring within the community, education and health services supports:**

- Social integration and change
- Citizenship development
- Educational policies and learning
- Behaviour and attitude change
- Wider participation and cultural diversity

It also supports:

- Young people as they develop and mature, or start and grow their own businesses
- Parents as they support their families
- Anyone going through a transition, such as working abroad or approaching retirement

## MENTORING IN ORGANISATIONS OF ALL KINDS

### MENTORING HAS MANY USES



Mentoring is used for a wide range of purposes, eg:

- **Induction and on-boarding:** to help people get up to speed in an organisation
- **Leadership development:** to help develop leadership abilities
- **Succession planning:** to develop potential managers of the future
- **Talent programmes:** to develop talent, potential and capability
- **Reflective practice:** to ensure effective learning for the future
- **Career progression:** to assist in identifying and supporting potential
- **Support for learning at work:** to encourage optimal learning and performance
- **Diversity programmes:** to respect and value cultural and social diversity
- **Redundancy support:** to assist people adapting to unexpected change
- **Support in times of change at work:** to ensure rapid assimilation and delivery
- **Within change programmes:** to help people understand what is involved in change
- **Enterprise development:** to start and develop new businesses

## MENTORING IN ORGANISATIONS OF ALL KINDS

### DEALING WITH CHANGE



Generally, people in any work environment respond positively to change when they take responsibility for their own development. Some organisations recognise this when they write their Mission or Strategic Statements. Good organisations also recognise the importance of the role they play in offering assistance to people during periods of change. Mentoring is one way employers can provide this assistance.



## MENTORING IN ORGANISATIONS OF ALL KINDS



### MISSION STATEMENTS

The idea that people make the difference is often present in mission and strategic statements. For example:

*“Able and Co. will be a fast moving, customer-focused organisation, ensuring value for money, and getting results through well-motivated staff.”*

*“We recognise the importance of our human assets in delivering our company’s mission.”*

*“At Jones Inc, people will be empowered to secure effective and exceptionally responsive service to customers.”*

*“We aim for extraordinary customer satisfaction through a people-focused strategy.”*

*“Our mission will be achieved through the willing efforts of all our people.”*

*“People are the fundamental asset on which the enterprise’s success will be based.”*

## MENTORING IN ORGANISATIONS OF ALL KINDS

### VALUE STATEMENTS



Many organisations establish a set of values in order to describe how their business should operate.

Values are often written down as part of the organisation's strategy, eg:

- To **delight the customer**, by providing the right advice, right information at the right time
- To be **ethically led** and **committed to sustainability**
- To **respect and value people's opinions**, through our diversity policy
- To **focus on people**, by supporting and developing staff
- To **encourage openness in all our business dealings**, through developing a 'blame-free' environment
- To **strive for excellence** in the delivery of all our services
- To deal with all our staff and clients with **fairness and honesty**
- To be viewed as a '**good**' employer in the market place
- To recognise and act on both our **corporate and social responsibilities**



## MENTORING IN ORGANISATIONS OF ALL KINDS



### VALUES

- ✓ **Mentoring** helps people to understand how a company's values are realised in the organisation. It helps them feel that they are making a worthwhile contribution
- ✓ **Mentoring** has strategic development implications. It supports national and international standards of conditions of work
- ✓ **Mentoring** supports development and training strategies
- ✓ **Mentoring** can make a contribution to the delivery of the mission and strategy and the achievement of objectives. It helps to uphold organisational values
- ✓ **Mentoring** helps individuals to develop within the organisational framework

## MENTORING IN ORGANISATIONS OF ALL KINDS FROM THE FRONT LINE



“Mentoring helps people understand and work through change and so contributes to the achievement of the Mission or Strategy. Mentoring helps people to learn and supports self-development.”

**An experienced mentor**



# THINKING ABOUT MENTORING

## THINKING ABOUT MENTORING

### WHAT IS MENTORING?



In mentoring, the relationship between mentor and mentee is all-important.

- There is a high degree of trust and mutual regard
- The mentor helps another person become what that person aspires to be
- The mentor helps the mentee to realise his or her potential
- The mentor learns and develops also, through being a mentor and using mentoring



## THINKING ABOUT MENTORING

### WHAT IS MENTORING?

You have probably been mentored already! Many people can remember being helped by someone who took an interest in their welfare, shared experience and knowledge, and helped them to develop. Often this relationship will have played a significant role in their personal development and getting on in life.



## THINKING ABOUT MENTORING

### WHAT IS MENTORING?



A good mentor remembered:

*“When I joined the business I was asked after a few weeks to find someone to be my mentor. I asked Peter since we worked in the same area and he was friendly and approachable. We set aside an hour a week so I could talk through issues that were concerning me. We ranged over a lot of issues, personal as well as professional. Peter would make sure we finished the meeting with action points that I would try to follow up on, and that would often be where we started from the next week. But I could always ask him questions between our meetings as well. It was valuable to be able to turn to him over the kind of small matters that you would hesitate to bother some people with, especially your line manager. Peter helped me to get a picture of the whole business and my place in it. With his help I settled in quickly and built up a sense of how my career might develop and what I needed to learn in order to make progress.”*

## THINKING ABOUT MENTORING

### IDENTIFY YOUR OWN MENTORS



Ask yourself the following questions:

- Who took an interest in my welfare and development at a time when I was taking on challenges, such as starting a new job?
- Who has been a useful role model in my life?
- Who helped me to uncover and use a hidden talent or ability?
- Who helped me face and resolve a difficult situation in my personal and/or professional life?
- Who challenged me to acquire a new vision and take a new direction?
- Who supported me to acquire a new vision and take a new direction?

These people have been your mentors.

## THINKING ABOUT MENTORING

### FAMOUS MENTORS



There have been many well-known examples of the mentoring relationship throughout history, including:

**In business** – Sir Freddie Laker, mentor to Sir Richard Branson; Louise Wilson, mentor to Stella McCartney

**In sport** – Steve Cram, mentor to Paula Radcliffe; Pam Shriver, mentor to Venus Williams

**In politics** – Michelle Robinson, mentor to Barack Obama; Walter Sisulu, mentor to Nelson Mandela

**In the performing arts** – Rudolf Nureyev, mentor to Linda Maybarduk; Elizabeth Kemp, mentor to Lady Gaga

**In Ancient Greece** – Mentor (Athene), mentor to Telemachus in Homer's *Odyssey*; Socrates, mentor to Plato

For a comprehensive list see:

<http://www.mentors.ca/mentorpairs.html>





## THINKING ABOUT MENTORING

### MENTOR & MANAGER



As a **manager** you are concerned with the objectives of both team and organisation.

As a **mentor** you help your mentee to learn within the context of a supportive relationship.

Mentoring and managing are not completely distinct. Managers may often use mentoring as part of their role. They also recognise the value of an employee having a separate mentor, as this will enhance the overall performance of the employee and his or her contribution to the team. A skilled manager may work with members of their team using a mentoring style, because he or she recognises that this enhances understanding, co-operation, performance and commitment.

## THINKING ABOUT MENTORING

### MENTOR & MANAGER



When the mentor is somebody different from the manager this does not have to be a threat to the manager's authority. The benefits of mentoring to the manager and his or her team will emerge in the form of greater commitment, motivation and learning on the part of the mentee.

- It is important that there is as much openness and honesty as possible between the line manager, mentor and mentee
- It is not the role of the mentor to report to the line manager about the mentee's progress because the confidentiality of the mentoring relationship must be respected

THINKING ABOUT MENTORING

## MENTOR & MANAGER



“ *One of the things mentors and mentees should do is to make sure that the mentee's line manager knows that mentoring is going on.* ”

**An experienced  
service industry mentee**

## THINKING ABOUT MENTORING

### VARIETIES OF MENTEES



There is no blueprint for the ideal mentoring relationship. You may be a mentor to:

- A peer
- A team member
- Someone you know well
- Someone you have not met before
- Someone from a different department or function
- Someone from a different organisation

It is usually not advisable to have your line manager as your mentor because at times there may be a conflict of interest. In some circumstances a line manager can be a mentor but care has to be taken in establishing clear ground rules and a mutually agreed agenda.

What is common to all cases of mentoring is that the mentee comes to view things in a new way. The mentor promotes change in the mentee, helping that person towards a new vision of what is possible.

## THINKING ABOUT MENTORING

# BENEFITS OF MENTORING



### For the mentee

- Improved performance and productivity
- Enhanced career opportunity and career advancement
- Improved knowledge and skills development
- Leadership development
- Greater confidence, well-being, commitment and motivation

### For the mentor

- Improved performance
- Greater job satisfaction, loyalty, commitment and self-awareness
- New knowledge and skills acquired
- Leadership development
- Reduced conflict and improved relationships with colleagues and customers

## THINKING ABOUT MENTORING

# BENEFITS OF MENTORING



### For both

- Wider perspectives on the organisation and the market/context
- Improved strategic thinking
- Extended business networks and enhanced business opportunities

### For the manager

- A more motivated, effective and resourceful team member
- Improved skills and knowledge in the team
- Improved performance capability and opportunity

### For the business

- Improved productivity and performance
- Improved implementation of strategies and policies
- Improved staff retention, morale and motivation
- Improved communication and relationships with colleagues and customers
- Improved knowledge exchange and learning
- Improved growth and sustainability

## THINKING ABOUT MENTORING

# MENTORING & COACHING: DIFFERENCES



There is no universally agreed definition of either mentoring or coaching. In recent years, academics and practitioners alike have rethought and repositioned both mentoring and coaching. Research shows that both share the same skills and processes and often have the same aim: the all-round development of an individual within the context of a supportive professional relationship.

Definitions tend to be localised and specific to an individual business or scheme.

Mentoring and coaching therefore have much in common. The evidence from current practice suggests that the differences are subtle and important. For anyone seeking support at work, mentoring and coaching are best seen as complementary and in some contexts, interchangeable.

## THINKING ABOUT MENTORING

# MENTORING & COACHING: DIFFERENCES



Coaching takes many different forms, for example, performance coaching, sports or fitness coaching, life coaching, manager as coach, music or dance coaching and executive coaching. It tends to have a specific and tightly focused goal, or area of application.

A recent trend is for coaches in business contexts to be independent paid professionals. The paid business or life coach does not need specific experience or technical expertise to perform as a coach. They need to understand coaching. Other types of coaching usually require specific experience, ability, track record or technical expertise. The commercial nature of coaching means that it has many 'brands'.

Mentors offer support, challenge and encouragement to someone and while there is usually a focus (eg taking up a new post or starting a new business), mentoring can touch on any aspect of a person's life. A key value of the mentor is his or her knowledge and experience of business or the context where the mentee is seeking support. There is something of the 'been there and done that' quality in a mentor. The mentor may offer coaching and training from time to time as appropriate, but may also encourage the mentee to seek help from specialists in these roles.



## THINKING ABOUT MENTORING

### MENTORING: FOUR MAIN TYPES



**Developmental mentoring** supports the mentee's learning and development as he or she experiences some sort of change. It is often part of an organisational scheme within the private, public or social sectors.

**Sponsorship mentoring** is about fast-tracking the mentee in their career. This is the dominant model in the US. In the UK, it is linked to talent management programmes.

**Executive mentoring** helps an executive to work on their own performance, identifies developmental needs and develops leadership skills and thinking. The mentor can help the executive to network and take a long-term view on his or her career.

**Reverse mentoring** is when the mentor is younger or more junior than the mentee. It focuses on the differences of experience, understanding and attitudes as mentor and mentee learn about each other's worlds. In Time Warner in the US, younger, technically expert people mentor senior executives. In the UK health sector, patients mentor health care professionals.

## THINKING ABOUT MENTORING FROM THE FRONT LINE



“ I have often found that the definitions of mentoring and coaching in books are rather vague and simplistic. In the various organisations I have worked with, coachees and mentees all have different and usually vague definitions, if, indeed, they can articulate a definition at all! I have found it easier to have my own definition and understanding, and I encourage the organisations I work with to do the same. ”

**A professional coach/mentor**

## THINKING ABOUT MENTORING

# MENTORING & COUNSELLING



Mentoring uses counselling skills, such as active listening and action planning. While there can be a degree of overlap, mentoring is primarily about fulfilling potential, whereas the starting point for counselling is personal or psychological difficulties.

It is not appropriate for either the mentee or the mentor to attempt to address counselling issues. If the mentee is experiencing psychological difficulties, it can be appropriate in mentoring to discuss available options for tackling them.

## THINKING ABOUT MENTORING

# MENTORING & APPRAISAL



Mentoring and appraisal use many of the same techniques. The differences are:

**Appraisal** is part of a formal system which identifies strengths and weaknesses, and may be linked to performance-related pay, to opportunities for promotion or the requirement to undertake training.

**Mentoring** is not formally connected with structures of extrinsic reward – or penalty! The mentor is non-judgemental, and does not impose his/her views on any third party. The mentee can be candid with the mentor in a way that would be unlikely in the context of appraisal. Mentoring may be arranged by an appraiser to assist with the implementation of a personal development plan following an appraisal.



# MENTORING IN ACTION

## MENTORING IN ACTION

### GETTING STARTED



Although mentoring is a common activity, it is a form of helping that most people could develop further. Effective mentoring requires certain personal qualities and skills.

#### **How will you know that you are ready to be a mentor?**

This is an important question. You can address it in a number of ways:

- Recognise and reflect on any mentoring you do already
- Talk to other mentors
- Talk to people you have already mentored (officially or unofficially)
- Consider the differences between mentoring and management
- Consider the differences between mentoring and other ways of helping, eg: coaching, appraisal, counselling
- Reflect upon your own experience of being a mentee

## MENTORING IN ACTION

### GETTING STARTED



#### How will you know that you are ready to be a mentor?

You can also address this question by thinking about your attributes using the list below:

- A range of experience and variety of workplace skills
- A good understanding of the mentee's context
- A sense of commitment to the organisation, its values and mission
- Good listening skills
- Well-developed interpersonal skills
- An ability to relate well with people who want to learn
- An interest in helping and developing others
- An open mind, a flexible attitude, and a recognition of your own need for support
- Time and willingness to develop relationships with mentees

**Do you have these attributes? If so, you are ready to mentor.**



## MENTORING IN ACTION

### GETTING STARTED



“ I'm now about to become a mentor myself, having attended a mentoring workshop. I don't know if anyone I mentor will be fortunate enough to get as much out of the experience of being mentored as I did. But if I can contribute to someone else's development in some way then, hopefully, the experience will be rewarding both for the mentee and for myself. ”

**A manager approaching the mentoring role**



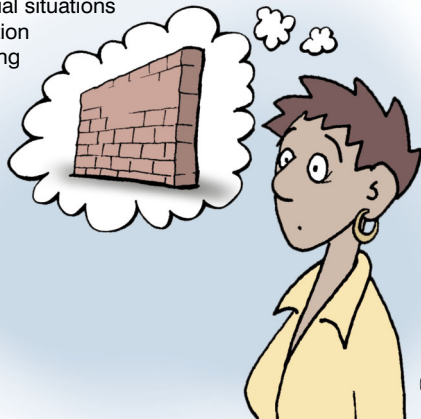
## MENTORING IN ACTION

### AREAS OF DEVELOPMENT



A mentor can help a mentee to:

- Understand appropriate behaviour in social situations
- Understand the workings of the organisation
- Acquire an open flexible attitude to learning
- Appreciate different and conflicting ideas
- Be aware of organisational politics
- Overcome setbacks and obstacles
- Acquire technical expertise
- Gain knowledge and skills
- Tolerate complexity
- Develop personally
- Adapt to change
- Develop values



## MENTORING IN ACTION

### 3-STAGE PROCESS



Mentoring includes a number of processes. Different mentors have different strengths and work in different ways. Whatever approach or style you use, working within a well-thought out, robust and flexible framework will ensure you are most effective in helping your mentee.

A useful framework is a 3-stage process\* of helping:



\* Adapted from the 'skilled helper model' described in Gerard Egan's *Skilled Helper: A Problem Management and Opportunity Development Approach to Helping*, 7th Edition, 2002 Brooks/Cole, Pacific Grove, California.

## MENTORING IN ACTION

### 3-STAGE PROCESS



The process can be used in a number of ways:

- To **reflect** upon what mentoring involves, and to **assess** yourself as a mentor
- As a **schedule** for a mentoring meeting - to work through the stages
- As a **map** of the mentoring process - to see what ground has been covered and what needs further attention
- To **review** the mentoring relationship over time, as the mentee moves towards achieving the goals identified earlier in the relationship
- To **enhance** shared understanding of the mentoring process and relationship, and to develop the mentee's ability to use the process independently

## MENTORING IN ACTION

### 3-STAGE PROCESS



“Mentoring gives me a real buzz and makes me feel unbelievably good that somebody can learn and develop with my help. It has enabled my influence to spread in the organisation and thus assist the change process in a way which is more powerful than any other process I know.”

**A manager and mentor**

## MENTORING IN ACTION

### STAGE 1: EXPLORATION



#### Strategies

As mentor, you aim to:

- Establish ground rules
- Take the lead by listening
- Pay attention to the relationship and develop it
- Clarify the aims and objectives of the mentoring
- Support the exploration

#### Methods

As mentor, you:

- Help create the agenda
- Listen carefully
- Ask open questions
- Summarise



## MENTORING IN ACTION



### STAGE 1: EXPLORATION

#### GETTING MAXIMUM BENEFIT

- Take the lead in creating a **rapport** with your mentee and an atmosphere that encourages exploration; show your **commitment** to the mentee, the mentoring process and the mentoring relationship
- Give it time, **be patient**; action plans come unstuck when rushed, and insufficient exploration leads to faulty understanding in Stage 2 and hence to inappropriate plans (investment of time and care in Stage 1 pays dividends later in the meeting and later in the relationship)
- Help your mentee to arrive at **his or her own answers**
- Resist the temptation to give advice or tell the mentee what to do (there are occasions when advice and direction are helpful, but not in Stage 1)

## MENTORING IN ACTION



### STAGE 1: EXPLORATION

#### POSSIBLE QUESTIONS/COMMENTS

As a mentor, you might say:

*'What would you like to talk about today?'*

*'Let's explore this issue some more.'*

*'Tell me about your experience of...'*

*'You've said very little about X, but that seems to be central to the issue we are discussing.'*

*'What I understand you to be saying is... (paraphrase/summarise). Does that seem right?'*

*'Shall we start by recapping on our last meeting?'*

## MENTORING IN ACTION



### STAGE 1: EXPLORATION

#### HOW LONG DOES STAGE 1 LAST?

This is an important question but it does not have a straightforward answer. It is important to think about how much time to give to exploring an issue so that you can assess progress.

Much depends upon the topic being explored:



- If it is something **significant**, related to changes in personal or professional attitudes and behaviours, you may find that you need to explore an issue on and off for several months or longer



- If it is a **practical** topic, related to knowledge or skills, it may take a few minutes or a few hours

Either as mentor or mentee, if you feel that you are stuck in a rut of endless exploration with no progress, it is time to talk about your relationship.



## MENTORING IN ACTION

### STAGE 2: NEW UNDERSTANDING



#### Strategies

As mentor, you aim to:

- Support and understand
- Be constructive and positive
- Recognise strengths
- Help to generate options
- Help to establish priorities
- Help to identify developmental needs
- Inspire and motivate

#### Methods

As mentor, you:

- Listen and challenge
- Ask open and closed questions
- Summarise and clarify
- Give information and advice
- Share experiences and tell stories



## MENTORING IN ACTION

### STAGE 2: NEW UNDERSTANDING

#### GETTING MAXIMUM BENEFIT



Stage 2 is the **turning point** in the process. New understanding is experienced in a number of ways, depending on the individual and the importance of the issue in hand. Be flexible and resourceful, ready to move forward (and sometimes backwards) empathically and constructively with the mentee.

New understanding often releases energy, it can be exciting. Once your mentee begins to see things differently, offer **encouragement**. Progress can be rapid but again – **don't rush**.

Arriving at a new understanding can be uncomfortable: the mentee may be resistant. Then progress can be slow and erratic. This could signal the need for more exploration.

Be ready to return to Stage 1, eg: 'Now that you appreciate better the impact of working with new colleagues, perhaps you would like to look again at your thoughts about further training'.

## MENTORING IN ACTION



### STAGE 2: NEW UNDERSTANDING

#### GETTING MAXIMUM BENEFIT

If the mentee is resistant, be **supportive** and **sensitive** so that when you **challenge**, your mentee is receptive and able to learn.

Challenge **positively**, eg: refer to the mentee's achievements, positive qualities and potential, as well as offer constructive criticism of current behaviour, perceptions and attitudes that may be causing problems. **Be patient.**

New learning can make the mentee feel vulnerable, especially if it requires recognition that old ways of behaving have outlived their usefulness and there is a need to change.

## MENTORING IN ACTION



### STAGE 2: NEW UNDERSTANDING

#### GETTING MAXIMUM BENEFIT

Help your mentee **consolidate** his/her learning, to hold on to the fruits of the exploration in Stage 1. One way to do this is to **share stories** and **experiences** of your own.

Don't share too soon, as new learning can be fragile at first. There is a risk of taking the mentee away from his/her own agenda.

**Reflect** back and clarify what the mentee has learned and the implications of **new developmental needs, goals and aspirations.**

Offer advice sparingly and when you are confident that it is relevant to the mentee. Try to present your experiences as data to be discussed rather than actions to be copied.

Regard all your stories, advice and guidance as opportunities for the mentee and you to reflect and learn, in the context of the mentee's issues, aims and aspirations.

## MENTORING IN ACTION

### STAGE 2: NEW UNDERSTANDING

#### POSSIBLE QUESTIONS/COMMENTS



As mentor, you might say:

*'The way you're talking now reminds me of the time I...'*

*'What is there to learn here, what's the most important thing to work on, now that you're seeing the situation differently?'*

*'What are your options here and what might be the consequences of doing X?'*

*'Well done, that feels like a breakthrough.'*

*'Now that doing X looks like a viable option, there is some useful information I could share with you.'*

*'You've shown real commitment in the situation, but there are also things you've done that you regret. Is that a fair comment?'*

## MENTORING IN ACTION



### STAGE 2: NEW UNDERSTANDING

#### HOW LONG DOES STAGE 2 LAST?

Reaching new understandings is key to the next stage. Action born out of poor understanding is always flawed! This stage should not be rushed, although reaching a new understanding can happen quite spontaneously during a Stage 1 discussion.



It may take hours, days, weeks, months and even years to fully understand a complex issue.

The timescale is dependent on experience, the nature and complexity of the issue and the quality of the mentoring conversations.

## MENTORING IN ACTION



### STAGE 3: ACTION PLANNING

#### Strategies

As mentor, you aim to:

- Examine options for action and their consequences
- Review the mentoring process and the relationship
- Help your mentee to develop an action plan

#### Methods

As mentor, you:

- Encourage new and creative ways of thinking
- Help to make decisions and solve problems
- Agree action plans
- Monitor progress and evaluate outcomes



## MENTORING IN ACTION

### STAGE 3: ACTION PLANNING

#### GETTING MAXIMUM BENEFIT



When Stages 1 and 2 are done thoroughly, Stage 3 is usually straightforward and uses familiar **people management/development skills**.

Action plans are followed through when the mentee **owns** the solution. Give advice and direction sparingly. Enhance **commitment** to change by clear agreements and practical monitoring of progress.

Look after the **relationship**, discuss its progress with your mentee. **Don't expect every meeting to end in an action plan.** Sometimes the action will be to meet again, and that will be progress enough. Affirm and celebrate progress.



## MENTORING IN ACTION

### STAGE 3: ACTION PLANNING

#### POSSIBLE QUESTIONS/COMMENTS



As mentor, you might say:

*'Let's look at the pros and cons of this option.'*

*'It is important you have a clear idea of how you will assess your own progress and success. Do you have any thoughts about that?'*

*'Let's spend some time talking about the mentoring itself, as we agreed to review after three months.'*

*'How can I help you do this? Perhaps a demonstration of X would help.'*

*'How will you know it's working for you?'*

*'Now that you've decided to do Y, is there anything you need to do first?'*

## MENTORING IN ACTION

### STAGE 3: ACTION PLANNING

#### HOW LONG DOES STAGE 3 LAST?



The important point here is that it can be very tempting to rush to action. This is often true when there is a lot of pressure on people to perform at work.

The quality of action is firmly linked to the quality of Stages 1 and 2.



Sometimes the action phase is immediate but, in the case of complex attitudinal and behavioural issues, it may take weeks, months or even years to fully develop.

Mentoring is seldom about 'quick fixes'. If it is to work really well, a longer-term view is necessary.

## MENTORING IN ACTION

### FROM THE FRONT LINE



“ *To be a successful mentor enjoy what you're doing as well as BELIEVE in your mentee. Do not hesitate to ask for help from another mentor with special expertise. Friendship and rapport are important. The rewards of being a mentor are similar to the enriching experiences of meeting interesting people and facing the challenges of solving difficult problems. A good mentor, therefore, brings enjoyment of people and ideas and a strong belief to the mentoring situation.* ”

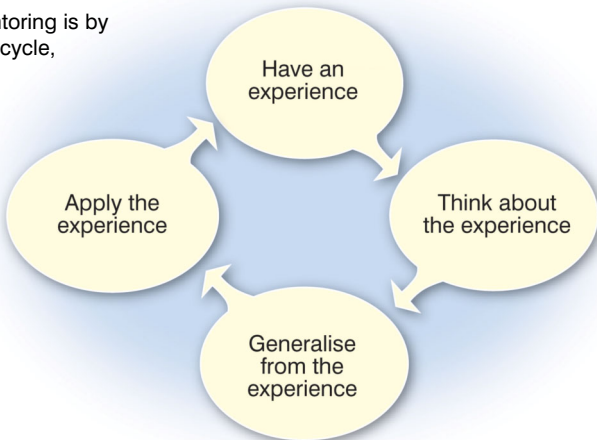
**A mentor with many years' experience**

## MENTORING IN ACTION

### FACILITATING LEARNING



Another way to look at mentoring is by making use of the learning cycle, based on Kolb's theory of experiential learning. An awareness of the cycle can help the mentor and mentee to focus on the mentee's learning.

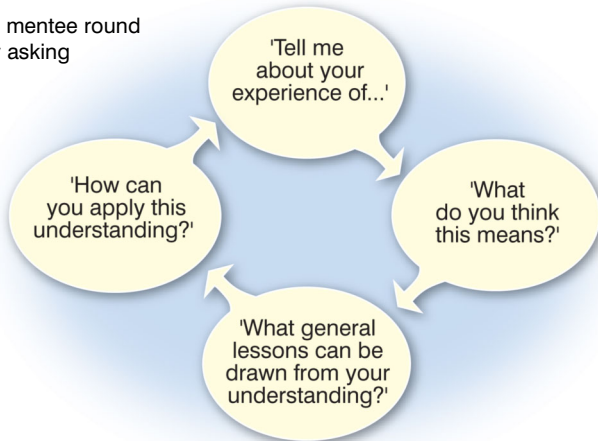


## MENTORING IN ACTION

### THE LEARNING CYCLE



The mentor helps the mentee round the learning cycle by asking questions such as:



## MENTORING IN ACTION

### FINDING A MENTEE



In your business or organisation, your mentee may be somebody you know already. An existing relationship may develop into mentoring.

Your business or organisation may have a formal mentoring scheme or some system for facilitating mentoring.

Then a match will be arranged (see section on Scheme Design).

You may volunteer to be a mentor in schools, charities, or in the context of small business development or start-up. Your local press or internet searches should help you find such schemes.



## MENTORING IN ACTION

### FINDING A MENTOR



If you have identified someone who could be your mentor ask yourself:

- Will this individual stretch and challenge my thinking?
- Is the experience gap between us too small or too great?
- Is this someone who is still learning and developing themselves?
- Would we have mutual respect?
- Are they willing to be my mentor?
- Do they have time available to commit to being my mentor?

## MENTORING IN ACTION

### WHEN MENTEE CHOOSES MENTOR



Mentoring is primarily for the mentee, **for their welfare, development, progress,** within the context of their responsibilities and aspirations.

A person seeks a mentor because he or she recognises the need for mentoring support, or the need is recognised by a concerned third party (eg the person's manager, a learning and development consultant, or an HRD manager).

As a mentor, what do you think would be helpful for your mentee to know about you? Put yourself in their position.

The information you give about yourself needs careful thought. It can help to write it down or talk it through with a trusted friend, or your own mentor.





## MENTORING IN ACTION

### BEING A MENTOR



Keep in mind that a mentee will benefit from your:

- Knowledge
- Experience
- Personal qualities and skills



## MENTORING IN ACTION

### BEING A MENTOR KNOWLEDGE



Think about your knowledge of the **organisation or business**:

- Its politics
- Its culture
- Its history
- Its character
- Its future

Your perspective on all aspects of your organisation or business will be helpful to your mentee. Your perspective provides a framework and stimulus for your mentee to develop their own perspective.



## MENTORING IN ACTION

# BEING A MENTOR EXPERIENCE



As a mentor you will draw on your experience of:

- Facing difficulties and meeting new challenges
- Being helped, being a mentee
- Working with others, contributing to an organisation
- Achievement, success, failure
- A variety of organisations/working practices
- Being responsible for yourself, your actions and reactions to others and situations
- Coping with stress, setback and (possibly) trauma

Sharing your experience will encourage your mentee to learn from their own experience, in a constructive way, for themselves and for the organisation or business.

The best way to use your experience is in stage 2 of the 3-Stage Process of mentoring (see pages [47-52](#)).

## MENTORING IN ACTION

# BEING A MENTOR

## PERSONAL QUALITIES



As a mentor you will draw on your ability to be:

- **Enthusiastic** - genuinely interested in the mentee and his/her concerns, needs, dreams and aspirations
- **Motivating and encouraging** - to channel the mentee's energy into constructive change, new challenges and overcoming difficulties
- **Open** - prepared to share your own experience of similar issues, be honest about yourself, be honest about the mentee
- **Empathic** - able to appreciate how the mentee thinks and feels and behaves
- **Positive in your outlook** - able to appreciate the mentee's point of view and see solutions
- **A good listener** - able to really focus on what the mentee is saying without your own thoughts crowding out the mentee's words

MENTORING IN ACTION

## FROM THE FRONT LINE



“*Fit and chemistry must be considered when pairing the mentor and the protégé. If the two don't get along, it matters little what each can offer the other in terms of knowledge and skills.*”

**Michael Zey, Building a successful  
formal mentor program**

Mentoring International, 3(1): 48-51 (1989)

## MENTORING IN ACTION

### BEING A MENTEE



People learn how to be a mentee through being part of a mentoring relationship. With commitment, experience and practice, mentees become better at making the most of the mentoring process. Successful mentees:

- ✓ Accept **challenge** willingly; they are **committed** to the mentoring process
- ✓ Are prepared to be **open** and **honest** about themselves
- ✓ Take **responsibility** for their own learning
- ✓ Have **trust** and **confidence** in their mentor; they are willing to discuss issues openly
- ✓ Recognise that learning can involve taking **risks** in order to make progress

## MENTORING IN ACTION

### BEING A MENTEE



Successful mentees also:

- ✓ Want to be **active** in their development and see learning as a **continuing process**
- ✓ Make **progress**, and **recognise** when the relationship is reaching its natural end

When the mentee **owns** the process and **understands** the 3-Stage Process, the quality of learning is improved.



## MENTORING IN ACTION

### MENTEES' EXPECTATIONS



Remember you are not the mentee's manager. If you are, you need to put this role on hold while you are mentoring. Mentees who understand the value of mentoring and are committed to a mentoring relationship, expect to gain by:

- Being challenged
- Opening up and being honest
- Learning through discussion
- Learning from example and from mistakes
- Receiving support, feedback and advice
- Listening and being listened to
- Becoming more self-aware
- Enjoying the relationship
- Being coached
- Being encouraged
- Learning how the organisation works
- Fostering the mentoring relationship
- Sharing critical knowledge
- Developing greater self-confidence
- Being assisted in developing their careers



## MENTORING IN ACTION

### MENTEES' EXPECTATIONS



New and inexperienced mentees may have **unrealistic** expectations. For instance, they may expect to:

- Be managed and adopt a passive role
- Be given opportunities on a plate
- Be given answers to problems
- Be told what to do
- Have an easy ride
- Receive favours
- End mentoring when the immediate problem or issue appears to be sorted out
- Gossip and complain

An inexperienced mentee may need a lot of support and gentle challenge if they have such ideas!

MENTORING IN ACTION

## FROM THE FRONT LINE



“Mentoring is about learning, and one thing I learned is how to be a mentee. In a way, this is the greatest benefit of all. Now it's as if I can mentor myself, and this includes seeking help when I need it. I'm also beginning to think I would like to mentor someone else.”

**A mentee**

## MENTORING IN ACTION

### WHAT MENTEES NEED



A systematic approach, such as the 3-Stage Process, increases the effectiveness of mentoring. At the same time, mentees look for different things, such as:

- A sounding-board and listener
- A giver of encouragement
- A critical friend
- A source of emotional support
- A confidant
- A source of knowledge
- A role model

## MENTORING IN ACTION

### AREAS FOR DISCUSSION



Mentees and mentors talk about:

- The mentee's work-related issues
- Learning opportunities
- Career and business development
- The mentor's work-related issues
- Leadership issues
- Problems and challenges
- Issues with 'difficult' people
- Performance issues with self and others
- Time management
- Personal issues
- Domestic issues





# WORKING TOGETHER

WORKING TOGETHER

## THE FIRST MEETING



*“ I was assigned a mentor when I took up a new post and I very quickly realised how helpful he would be to me. He was approachable, enthusiastic and very capable, and I did not feel silly asking basic questions. ”*

**An inexperienced mentee**

## WORKING TOGETHER

# THE FIRST MEETING

## KEY ISSUES



### **Preparation**

It is helpful to have an agenda for each meeting. Reflect on the nature of mentoring, the process as well as the outcomes. Think about your commitment to using mentoring well and giving it adequate time.

### **Getting to know each other**

Give this enough time; it is the basis of trust and working well together. Share experiences from your pasts.

### **Time**

Your relationship will change over time. Many mentees and mentors notice that discussion topics widen and deepen.

### **Difficulties**

Sometimes things may go wrong. Nothing can replace honest and open discussion about the relationship. Try to let others know about the existence of your mentoring relationship to avoid any misunderstanding or resentment. Keep the relationship under review.

## WORKING TOGETHER

# THE FIRST MEETING

## GROUND RULES



Establish ground rules. These will include:

- **Confidentiality:** this is essential. Agree between yourselves the boundaries of the relationship
- **Time commitment:** how much and how often? A rough guide is once a month for about 1.5 hours
- **Location:** where will you meet? Their office or yours? In a café? Over lunch?
- **Recording meetings:** will you record your meeting and, if so, how (a diary or log)? What will you do with the record? Keep in mind confidentiality



## WORKING TOGETHER

# RELATIONSHIP DIMENSIONS



The following may help establish the ground rules and act as a framework for reviewing the relationship.

**OPEN**

**CLOSED**

**PUBLIC**

**PRIVATE**

**FORMAL**

**INFORMAL**

**ACTIVE**

**PASSIVE**

**STABLE**

**UNSTABLE**

## WORKING TOGETHER

# RELATIONSHIP DIMENSIONS



The **open/closed** dimension is about the content. What kind of things will be talked about? This is up for discussion. If it is **open**, then anything is on the agenda. If it is **closed**, the discussion may be focused on specific issues.

The **public/private** dimension is about who knows mentoring is going on. If the mentoring is in an organisation, keeping it **private** may lead to speculation about its purpose and nature. Making it **public** is good for mentoring and good for the relationship in the organisational context.

The **formal/informal** dimension is about the administration and management of the relationship. In a **formal** arrangement, the mentoring pair may agree meetings in advance, take notes, time limit the discussion, agree to meet in the same venue at regular intervals. If it is **informal** they will meet on an 'as required basis' and generally work on a 'go with the flow' basis.

## WORKING TOGETHER

# RELATIONSHIP DIMENSIONS



The **active/passive** dimension is about activity. Who does what in the relationship? The mentee is the more **active** in the relationship as he or she is the one undergoing change and carrying out action plans. The mentor may also agree to take some actions, such as gathering information for the mentee, and may indeed, at times, ask the mentee for a meeting. If both feel the mentoring is **passive**, if not much is happening, it is probably time to review the mentoring relationship.

The **stable/unstable** dimension is about trust and consistency. It is about sticking to the ground rules while being prepared to jointly review them. It is about sticking to the meeting schedule and not changing it (particularly at the last minute). It is about developing momentum to the mentoring process (by using the 3-Stage Process, for example) and maintaining it.

## WORKING TOGETHER

# MAINTAINING THE PARTNERSHIP



Like any worthwhile relationship, mentoring relationships have phases:

- Progressive
- Flat-lining
- Break-down

A progressive relationship builds over time, achieves its long-term aims and comes to a natural end.

A flat-lining relationship is one that may falter or get stuck. It may be fairly short. It may come to an end or it could be revived (see next 3 pages).

A break-down is where the relationship fails or is terminated early for various reasons.

Research shows that all these types may be beneficial but the 'progressive' offers the most potential.

*(Based on Westland, P. (2016) Insights into the determinants towards building successful dyadic mentoring relationships, Unpublished Doctoral Thesis, Sheffield Hallam University, UK)*

## WORKING TOGETHER

# MAINTAINING THE PARTNERSHIP

## MENTOR'S ROLE



To keep the partnership going through the life cycle it is important to consider your attitude as a mentor and the climate you help to create with your mentee.

The climate needs to be relaxed, open and encouraging. This can be influenced by a number of things:

- The relationship you have previously established:
  - How well do you know the person?
  - How much trust is there already?
  - What do you have in common?
  - What are your differences?
- The level of priority you give to mentoring:
  - Is it important to you?
  - Are you aware of how beneficial mentoring can be to you, the mentee and your organisation?
  - How serious are you about the business of helping others?

## WORKING TOGETHER

# MAINTAINING THE PARTNERSHIP

## MENTOR'S ROLE



The climate can also be helped by:

- Sitting in a relaxed manner in comfortable surroundings
- Privacy
- Asking open questions and listening carefully to the responses
- Being prepared, on occasion, to talk openly about yourself
- Reviewing the ground rules and the nature of the relationship
- Providing a drink, such as coffee or tea



## WORKING TOGETHER

# MAINTAINING THE PARTNERSHIP

## MENTEE'S ROLE



As a **mentee** your attitude towards your mentor will contribute to the climate.

Be prepared to:

- Talk about yourself
- Listen and ask questions
- View the first meeting as a social event aimed at building a longer-term learning relationship
- Establish the agenda and the ground rules
- Review the relationship periodically and when necessary

## WORKING TOGETHER

# MENTORING AT A DISTANCE



A face-to-face meeting is the usual setting for mentoring. However, mentoring can also take place remotely. This extends the opportunities for mentoring when regular face-to-face meetings are not feasible, as an alternative or additional way to communicate and work together.

Because of its *distance*, e-mentoring has the potential to help the mentee to discuss issues openly and may help overcome any embarrassment or inhibition, paving the way for serious dialogue and constructive change. It also offers scope for mentor and mentee to reflect on the content of their exchanges.

E mentoring (or telementoring) has become popular around the world for schools, colleges and universities, small businesses and people in isolated communities. Using technology is not really any different from face-to-face meetings and can be just as effective. The same ethical considerations apply as face-to-face mentoring when using, for example, Skype or Zoom.



## WORKING TOGETHER

# MENTORING AT A DISTANCE



## GOOD PRACTICE GUIDELINES

- If possible, meet face-to-face at least once before the 'distance' mentoring begins (three meetings is optimal). If this is not possible, follow the principles of the first meeting described earlier ([page 77](#)), and allow time for a good working relationship to develop
- The ground rules and boundaries that underpin face-to-face mentoring apply with equal importance at a distance
- Agree timescales for checking and exchanging emails and/or calls (whether daily/once a week/fortnightly). This will vary at different stages of the mentoring relationship
- Agree response times to emails/phone messages – within 24 or 48 hours, for example
- Be ready to seek clarification to avoid misunderstandings and jumping to conclusions

WORKING TOGETHER

## FROM THE FRONT LINE



*“ I very quickly realised that this particular mentor was not for me. So we discussed it and agreed to end it. There was no loss of face on anyone’s part. We tried, and it didn’t work out. That’s fine. Think what it would have been like if we had carried on regardless! ”*

**A mentee**

## WORKING TOGETHER

### HOW TO END IT



This is the only certain event in the relationship! The end may happen when the mentee has reached a stage when he/she no longer feels the need for regular contact. The mentee is confident and able to move on. It is important to consider how it will end. If the relationship has been successful, there will be cause for celebration *and* a sense of loss. Attend to both.

You may agree to meet socially or less frequently or simply call a halt.

Look back and review your mentoring relationship and what you value about it:

- What were your original goals and were they achieved?
- Did they change, did you discover new goals/aspirations?
- What problems did you have and how did you resolve them?
- Would you seek a mentoring relationship again?
- What have you valued in mentoring, in the process as well as the outcomes?

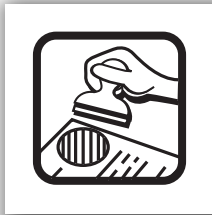
WORKING TOGETHER

FROM THE FRONT LINE



“ *When this mentoring relationship comes to an end, you will want to move on. There will be other people who come along in your life who will become your mentor.* ”

**A mentee in financial services**



# MENTORING SCHEMES

## MENTORING SCHEMES

### KEY FACTORS



Much can be done to promote mentoring in an organisation. Two factors are key:

The success of any organisational mentoring scheme is dependent to a significant degree on the visible participation of senior managers as mentors and mentees.

And

Successful mentoring schemes usually start small and grow gradually, stimulated by enthusiasm and positive example, and support.

## MENTORING SCHEMES

### SCHEME DESIGN



If you have responsibility for designing and promoting a mentoring scheme, the following guidance will be useful. First establish the purpose of the scheme:

Who is mentoring aimed at? What is it for? What are the expectations of the scheme?

**Questions to ask:**

**Who:** New or established staff, or both? Staff in new job roles and positions? Staff undergoing further training? Young entrepreneurs? School students?

**What for:** To enhance job satisfaction and performance? To realise organisational goals and values and implement policy? To accelerate induction? To enhance training? To develop talent and leadership? To grow a business? To support a young person in transition?

**Expectations:** Greater commitment? Improved communication? Staff development? Improved performance? Improved adaptation to change? Improved sustainability or business survival? Smoother transition to 'big' school? Enhanced cultural climate of the organisation?

## MENTORING SCHEMES

### SCHEME DESIGN



#### **Identify factors that will support or hinder mentoring**

- Find out what mentoring is going on already
- Identify people who are enthusiastic about mentoring
- Identify people who are positive about learning and development
- Will the scheme have top management support?
- Will senior management participate?
- Are people willing/unwilling to give their time?
- Are people too busy?
- Is learning and development valued throughout the organisation?
- Are potential mentees asking for mentoring?



## MENTORING SCHEMES

### SCHEME DESIGN



#### **Develop an implementation plan to address the following**

Providing support for mentors and mentees  
Responding to queries, apprehensions and uncertainties  
Identifying enthusiastic people to be 'pioneer' mentors and mentees

#### **Evaluate**

See pages [103 onwards](#) for advice on evaluation



## MENTORING SCHEMES

### DEVELOPING & PROMOTING THE SCHEME



- Start with people who are interested
- Train and support these people in mentoring skills
- Invite mentors and mentees to share their experiences through in-house newsletters, and other channels of organisational communication
- Have regular updates of progress in the scheme
- Publicise the mentoring partnerships
- Make mentoring part of training programmes
- Offer mentoring during and following a training programme
- Regularly review the scheme
- Don't expect that mentoring will solve all organisational problems

## MENTORING SCHEMES

### FROM THE FRONT LINE



“ *Mentoring schemes work best when they are not introduced as the new initiative that will solve organisational problems. Start small with positive volunteers and then watch it spread by word of mouth.* ”

**Experienced scheme co-ordinator**

## MENTORING SCHEMES

### MATCHING



Sometimes two people will match themselves as mentor and mentee without any outside help. Usually, bringing mentor and mentee together is facilitated.

- Some schemes publish lists of 'approved' mentors who are often volunteers with some training and who may provide a short pen-picture of themselves to help mentees make their choice
- In other schemes they simply put people together. In this case there ought to be a rationale for matching, clearly understood by both parties
- The 'dating agency' approach is sometimes used. Personal profiles and information, and sometimes standard tests and assessments are used to match people

Matching should be done sensitively and with care. Mentoring is like any other human relationship – it needs time to develop. Always suggest that people contract for three initial meetings and then review. If they are happy, they continue, if they are not they can have a 'no fault divorce'!

## MENTORING SCHEMES

### MATCHING



Commonly used criteria for matching:

- Culture/nationality
- Gender/sex
- Experience/background
- Personality characteristics
- Knowledge wanted/offered
- General 'wants'/'offers' approach
- Profiling eg Myers Briggs, emotional intelligence, learning styles
- Location/geography
- Tenure
- Common interests

Scheme co-ordinators will consider the following questions about matching:

- Will you match for similarity or difference? Each has its merits. A good match will attend to contrasts and differences between mentee and mentor, as well as similarities
- Will you allow, or wait for, people to sort out their own arrangements?
- Will you actively match or just give guidance?

## MENTORING SCHEMES

# ROLE OF SCHEME CO-ORDINATOR



The scheme co-ordinator will have a special role to play in helping sort out any difficulties. It is important to be aware of the kinds of difficulties that can arise.

### What can go wrong?

#### In the relationship:

- Role confusion
- No boundaries set
- Lack of effort
- Personality clash
- Lack of commitment
- Lack of trust
- Insufficient time input
- Lack of training of mentors and mentees
- Lack of support for mentors
- Mentor's or organisation's agenda rather than mentee's

#### In the scheme:

- Lack of voluntarism and choice
- Confusion about what mentoring is
- Confusion about the purpose of mentoring
- Organisational culture
- Wrong measurement, wrong expectations
- Insufficient time input
- No senior management buy in
- Management style
- Power/control obsession
- No support for mentors

## MENTORING SCHEMES

### FROM THE FRONT LINE



“ *Introducing mentoring did create interest but it also raised concerns. We approached the concerns in the ‘mentoring way’ by listening to them and trying to adjust the scheme design to match. The results were much better than we dared to hope for!* ”

**Training Manager,  
large private sector business**

## MENTORING SCHEMES

# CONDITIONS FOR SUCCESS



The main conditions for success of a mentoring scheme are:

- Voluntary participation and choice
- Clear recruitment strategy
- Training of mentors and mentees
- Ongoing support for mentors and mentees if they require it
- A clear and transparent matching policy
- Establishing ground rules
- Ongoing review
- Working with the mentee's agenda
- Accepting mentoring as legitimate work



## MENTORING SCHEMES

### EVALUATION



Systematic evaluation of a mentoring scheme will help to:

- Demonstrate the effectiveness of the scheme
- Develop the scheme
- Provide evidence to support it
- Give feedback about practice
- Identify any difficulties in the scheme and lead on to solutions

Evaluation is best started at the beginning of the scheme rather than at the end. This is so that any problems may be identified and resolved as the scheme progresses. Far better to deal with issues as they arise than wait for an 'end point' evaluation to learn that things have gone wrong!

## MENTORING SCHEMES

### EVALUATION



*'Not everything  
that counts can be counted.  
And, not everything that can be  
counted counts.'*

Einstein

In relation to mentoring, Einstein was right! When evaluating mentoring, there are things that can be counted that are of interest but have limited impact on the effectiveness of mentoring. Also, there are things that count that can't be directly counted but are strongly associated with the benefits of mentoring.



## MENTORING SCHEMES

### EVALUATION



#### **Things that can be counted and are of interest:**

- Numbers of people participating
- Duration of relationships
- Numbers of people who have received training and support
- The cost of training and support

#### **Things that count but can't be directly counted:**

- Successful and productive relationships
- Increased performance, sales figures, better bottom-line and appraisal ratings
- Improved staff retention rates, increased job satisfaction and confidence
- Improved motivation and morale, reduced conflict
- Better knowledge and skills transfer, improved awareness of self and others
- Leadership development and succession planning
- Increased opportunity, managing change and HR policy implementation

## MENTORING SCHEMES

### FROM THE FRONT LINE



“ *We have found that mentoring is good for the mentee,  
good for the mentor and good for the organisation.* ”

**Learning and Development Manager**

## MENTORING SCHEMES

### EVALUATION



#### What can be evaluated?

- The mentoring relationships
- Relationship outcomes
- Scheme processes
- Scheme outcomes
- Line management opinion
- Other stakeholders' views including customers and service users

#### Useful evaluation points

- At scheme planning stage
- At selection and training stage
- After the first few meetings
- As the relationships progress
- At the end of the relationship
- At the end of the scheme

If you are going to evaluate, develop an idea of what you hope the mentoring will deliver. For example, 'Mentoring will deliver a better induction experience for new colleagues,' or 'Mentoring will improve business growth,' or 'Mentoring will improve confidence.' Then seek information that can support these claims. This is called a theory-driven approach to evaluation.

## MENTORING SCHEMES

### MENTOR SUPPORT



Mentoring skills take a while to acquire and on-going support for mentors helps their skills to develop.

Support can take three different forms:

- Mentoring supervision
- Mentor support group
- Learning set



## MENTORING SCHEMES

### MENTORING SUPERVISION



Supervision is a quality control process to help the mentor:

- Develop confidence and skills as a mentor
- Demonstrate skill and knowledge
- Provide a different angle on an issue
- Increase self understanding, as a result of mentoring
- Celebrate success as a mentor
- Identify and address any difficulties, frustrations and blind spots in being a mentor
- Prevent personal burn out

## MENTORING SCHEMES

### MENTORING SUPERVISION



The supervisor's role is to:

- ✓ Help debrief the mentor
- ✓ Discuss and work on skills and process issues

The supervisor's role is NOT to:

- ✗ Discuss the content of the mentor's discussions with their mentee. The mentee has spoken with the mentor **in confidence**. It is important that this is respected

The supervisor could be another mentor. The frequency of supervision meetings will depend on the number of mentees the mentor has. Approximately every three months is a good benchmark.



## MENTORING SCHEMES

### MENTOR SUPPORT GROUP



Some organisations support their mentor development through regular mentor meetings. Here the participants discuss skills and process issues collectively. In some organisations mentees attend these meetings.

It is a good idea to have more experienced mentors running these meetings.



## MENTORING SCHEMES

### LEARNING SET



Another approach to mentor support is through learning set methodology.

It often takes about 3-4 months of regular mentoring meetings for a new mentor to develop their skills and experience of the 3-stage process. During this time, new mentors can get a lot of support, focused on their practice, from learning sets.

Learning sets normally consist of about six members with one person being the facilitator.

Each participant has a time slot during which members of the set focus on the participant's mentoring practice issue.

The set will offer opinion, advice, challenge and support to each other. This is a bit like group mentoring in fact!

## MENTORING SCHEMES

# STANDARDS & QUALIFICATIONS



In Europe, the European Mentoring and Coaching Council (EMCC) has established standards through research among the mentoring and coaching community. The EMCC also has a quality auditing process for educational and training courses in mentoring and coaching and has introduced individual accreditation.

In the UK, The Chartered Institute of Personnel and Development (CIPD) has also developed standards of mentoring and coaching practice.

## MENTORING SCHEMES

# STANDARDS & QUALIFICATIONS



There are mentoring courses in many countries around the world. Some examples are:

### **UK**

The following universities offer courses in mentoring: York St. John, Sheffield Hallam, Oxford Brookes, Hertfordshire, Wolverhampton, Bristol, Kingston.

### **Switzerland**

The University of Applied Sciences, Northwest Switzerland.

### **Australia**

The Australian Catholic University, Charles Sturt University and Wollongong University.

### **Singapore**

The Asia Pacific Management Institute.

### **USA**

The Universities of Phoenix, Touro, Pace, Wyoming.

The above list is for information and does not represent a recommendation. The list is indicative and not comprehensive.

## MENTORING SCHEMES

### ETHICS



Mentoring raises ethical questions. It is important that mentoring is a positive experience for the participants. Within schemes it is a good idea to establish an ethical process. Try to avoid this being a set of rules but instead have a process that invites ethical questions.

The following is based on an ethical statement from the European Mentoring and Coaching Council (EMCC):

Mentoring activity acknowledges the dignity of all participants. Mentors and mentees respect diversity and promote equal opportunities. It is the primary responsibility of the mentor to provide the best possible service to the mentee and to act in such a way as to cause no harm to the mentee or the host organisation. Both the mentor and mentee are committed to functioning from a position of dignity, autonomy and personal responsibility.

See: <https://www.southampton.ac.uk/professional-development/mentoring/mentoring-guidelines-in-a-nutshell.page>

## MENTORING SCHEMES

### TIPS FOR MENTORS



1. Maintain regular contact.
2. Always be honest.
3. Avoid being judgemental.
4. Recognise that you have your own need for support. A mentor may need a mentor as well!
5. Don't expect to have all the answers.
6. Help your mentee access resources and further support.
7. Be clear about expectations and boundaries.
8. Stand back from the issues your mentee raises but work together on them.
9. Respect confidentiality.
10. If the relationship falters - hang on in there!

## MENTORING SCHEMES

### TIPS FOR MENTEES



1. Accept challenge willingly.
2. Share with your mentor how you feel about the way the relationship is working.
3. Maintain a positive view of yourself.
4. Be active in your own development.
5. Have confidence in your mentor.
6. Be willing to discuss issues openly.
7. Take a few risks in order to progress.
8. Think about other ways to develop yourself outside of your mentoring relationship.
9. Don't expect too much of your mentor.
10. Talk about the end of your relationship when the time comes.

## MENTORING SCHEMES

### FROM THE FRONT LINE



“ *It was my mentor who convinced me that I was good enough, so that I could convince the senior managers of my readiness for promotion.* ”

**A mentee**





# ISSUES & QUESTIONS

## ISSUES & QUESTIONS

### MENTOR PROFILE



#### **Who should be a mentor?**

Anyone who is interested. It may be a manager or a peer. A mentor needs to be somebody that a mentee can trust. A mentor is often, but not always, older than the mentee. A mentor may also have experience greater than, or different from, the mentee's. A mentor is someone who recognises their own need for help and support.

#### **What about potential conflict between the line manager and the mentor?**

Ideally, your mentor should not be your line manager. There is some scope for confusion of roles. Many managers see that their role includes mentoring. However, most mentees value a degree of separation between the roles.

## ISSUES & QUESTIONS

# MENTORING IN PRACTICE



### How much time is involved?

This will vary depending on the mentee's needs. Average time in many organisations is 2-3 hours per month.

### What about bad mentoring?

The quality of mentoring depends in part upon circumstances and the environment. If the relationship does not work, be honest about it and either bring it to a close or try to resolve the differences. Mentor training and ongoing support may help here.

### How many mentors/mentees can I have?

It is possible to have more than one mentor. Each mentor offers something different to the mentee, most often in areas of knowledge and technical expertise. Mentors may have more than one mentee. It is really a question of how much time is available.

## ISSUES & QUESTIONS

# MENTORING IN PRACTICE



### Who gets credit for mentoring?

Credit is perhaps the wrong word. Mentoring is a satisfying and productive activity for the participants and the organisation. Some organisations suggest that mentoring becomes part of an individual's Personal Development Plan.

### What is the scope of mentoring?

The scope is as broad as one would want it to be. Mentoring is primarily about learning and development. Mentoring is present when there are changes and transitions to go through at work and in individual lives. A mentor recognises the links between the personal and the professional aspects of a person's life and, through the mentoring process, can help to harmonise and, when necessary, reconcile the two.

### What about confidentiality?

Confidentiality is crucial. Secrecy is inappropriate. Everything in the mentoring relationship should be done by agreement.

## ISSUES & QUESTIONS

# IMPROVING YOUR MENTORING SKILLS



### Do I need training?

It is a good idea for both mentors and mentees to consider doing some training in mentoring. This will help you to:

- Understand what is involved
- Understand how to get started
- Improve your confidence and commitment to mentoring
- Improve your mentoring skills
- Seek a mentor for yourself

### How do I improve as a mentor?

One way is to find a mentor for yourself. Another is to become part of a mentor support network with other mentors in your organisation. Further training and additional background reading are other options.

## ISSUES & QUESTIONS

# MENTORING IN CONTEXT



### **Should mentor and mentee be from the same ethnic/gender backgrounds?**

This can be a central aspect in mentoring in relation to equality, diversity, inclusion and social justice. Whatever the specific circumstances and individuals' backgrounds, the key to successful mentoring lies in the mentor being an active listener, having empathic understanding of the mentee's situation and goals, and being committed to the mentee's welfare and progress. One way to develop and maintain the quality and effectiveness of the mentoring is through regular review of the mentoring relationship.

### **Can mentoring solve all problems in the work place?**

No! Mentoring is helpful in times of change, e.g. when someone starts a job or new project. Mentoring complements other development and training activities.

## FURTHER INFORMATION



### Books

***'Coaching and Mentoring: Theory and Practice'***

Garvey, B., Stokes, P and Megginson, D (2017) (3rd edition) Sage Publishing

***'A very short, slightly interesting and reasonably cheap book on Coaching and Mentoring'***

Garvey B. (2011) Sage Publishing

***'The Mentoring Manual: Your step by step guide to being a better mentor'***

Starr, J. (2014), Pearson Business

***'The Blackwell Handbook of Mentoring'***

Allen, T and Eby, L (2011) Blackwell Publishing

***'Mentoring in Action'***

(2nd edition) Megginson, D. et.al. (2005), Kogan Page

***'Techniques for Coaching and Mentoring'***

Megginson, D and Clutterbuck, D (2005), Elsevier Butterworth-Heinemann, Oxford

***'Mentoring for Social Inclusion: A critical approach to nurturing mentor relationships'***

Colley, H (2003) Routledge Falmer, London

### For Reference

***'The Fundamentals of Coaching and Mentoring'*** a reference work in 6 volumes, Garvey B., (Ed) (2014) Sage Publishing

### Film for training mentors

***'Mentoring Conversations'*** available from [r.garvey@easynet.co.uk](mailto:r.garvey@easynet.co.uk)

## SOURCES OF INFORMATION



**Youth Business International** is a global voluntary mentoring network.

<https://www.youthbusiness.org/>

**Coachmentoring Ltd** provides consultancy and training in many aspects of mentoring  
[www.coachmentoring.co.uk](http://www.coachmentoring.co.uk)

**David Clutterbuck Partnership**, the website has some helpful information and downloads at  
[www.davidclutterbuckpartnership.com](http://www.davidclutterbuckpartnership.com)

**The Coaching and Mentoring Research Unit at Sheffield Hallam University** is a centre for mentoring research, consultancy and education at

[www.shu.ac.uk/sbs/research/organisational-development/coaching](http://www.shu.ac.uk/sbs/research/organisational-development/coaching)

**The United Nations** has a useful and informative website at  
[www.unescap.org](http://www.unescap.org)

**Peer Resources** is a primary source for peer, mentor and coaching resources in Canada at  
[www.mentors.ca](http://www.mentors.ca) and  
[www.peer.ca](http://www.peer.ca)

**Australia Council for the Arts** has an interesting and practical mentoring section at  
[www.australiacouncil.gov.au](http://www.australiacouncil.gov.au)

**BPW International – Federation of Business and Professional Women** has an informative website that facilitates networking at  
[www.bpw-international.org](http://www.bpw-international.org)

**Coaching and Mentoring Network** has an information service and articles at  
[www.coachingnetwork.org.uk](http://www.coachingnetwork.org.uk)

**The National Mentoring and Befriending Network** promotes mentoring in education and the community in the UK at  
[www.mandbf.org.uk](http://www.mandbf.org.uk)

**The European Mentoring and Coaching Council** is the main European professional body for mentoring and coaching at  
[www.emccouncil.org](http://www.emccouncil.org)

**Horsemouth** is an online mentoring and social networking site at  
[www.horsemouth.co.uk/](http://www.horsemouth.co.uk/)

**The International Mentoring Institute** gathers evidence based information on mentoring.  
<https://mentor.unm.edu/about>

**SME Toolkit South Africa** has a page for finding a mentor at  
[www.southafrica.smetoolkit.org](http://www.southafrica.smetoolkit.org)

**The Mentor Foundation**, focuses on youth, parents and drugs at  
[www.mentorfoundation.org](http://www.mentorfoundation.org)



## About the Authors

This book was written by Bob Garvey, Emeritus Professor and Geof Alred, former lecturer in the School of Education at Durham University



### **Geof Alred, MA, PhD, DCoP, CPsychol, AFBPsS**

Geof has wide experience of education, training and professional development. He is a former counsellor and counsellor trainer, and for several years until retirement in 2017, was a Chartered Counselling Psychologist in independent practice.



### **Bob Garvey, Cert Ed, MA, PhD, FRSA**

Bob works with individuals and organisations helping them to understand and apply mentoring in the workplace. He has published extensively on the subjects of mentoring and coaching in both books and academic and professional journals. Bob is both a mentor and a mentee.

# Pocketbooks

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360 Degree Feedback  
Absence Management  
Advanced Coaching  
Assertiveness  
Balance Sheet  
Body Language  
Business Planning  
Career Transition  
Coaching  
Cognitive Behavioural Coaching  
Collaborative Working  
Communicator's  
Competencies  
Confidence  
Creative Manager's  
C.R.M.  
Cross-cultural Business  
Customer Service  
Decision-making  
Delegation  
Developing People  
Discipline & Grievance  
Diversity  
Emotional Intelligence  
Empowerment  
Energy and Well-being  
Engagement

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Feedback  
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Handling Resistance  
Icebreakers  
Impact & Presence  
Improving Efficiency  
Improving Profitability  
Induction  
Influencing  
Interviewer's  
Key Account Manager's  
Leadership  
Learner's  
Learning Needs Analysis  
Listening Skills  
Management Models  
Manager's  
Managing Assessment Centres  
Managing Budgets  
Managing Cashflow  
Managing Change  
Managing Customer Service  
Managing Difficult Participants  
Managing Upwards  
Managing Your Appraisal  
Marketing

Mediation  
Meetings  
Memory  
Mentoring  
Mindfulness at Work  
Motivation  
Negotiator's  
Networking  
NLP  
Nurturing Innovation  
Openers & Closers  
People Manager's  
Performance Conversations  
Performance Management  
Personal Success  
Positive Mental Attitude  
Presentations  
Problem Behaviour  
Project Management  
Resilience  
Resolving Conflict  
Sales Excellence  
Salesperson's  
Self-managed Development  
Starting In Management  
Storytelling  
Strategy

Stress  
Succeeding at Interviews  
Sustainability  
Tackling Difficult Conversations  
Talent Management  
Teambuilding Activities  
Teamworking  
Team Coaching  
Telephone Skills  
Thinker's  
Time Management  
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