

Succeed with Mentorship

The handbook for both mentor and mentee



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1. User guide



- **Purpose:** The purpose of this handbook is to provide an essential easy-to-use information to help you get the most out of your mentoring relationship and to become an efficient mentor/mentee. It will guide you through the process of establishing, maintaining, strengthening and evaluating your mentoring relationship to ensure that you can benefit from it.
- **Audience:** This handbook is designed for those who are mentoring others and who are being mentored.

- **How to use:**

Step 1: Read carefully prior to meeting with your mentor/mentee.

Step 2: Think about your expectations from this relationship and write them down in the pre-meeting thought document.

Step 3: Refer to this guide consistently throughout your mentoring relationship to clarify your role, guide your conversations, communicate effectively with your mentor/mentee and ensure that you are maintaining a mutually beneficial relationship.



2. Understand the value

2.1 Mentoring is...

1

Development tool

a program that expands knowledge, network and career. The process allows more experienced individuals to support and develop others

2

Knowledge sharing

a process that improves facilitates the flow and exchange of information and ideas

3

Organizational culture enhancer

it can help individuals better understand the processes, policies and new cultures



2. Understand the value

2.2 Mentoring is not

01

Replacement of a formal development:

it isn't a formal training, but rather should motivate for formal self development activities

02

Management replacement:

a mentor should not take over the responsibilities of his mentee's advisors/management

03

Employee assistance program:

mentoring does not provide counseling on personal issues



3.Template: build the relationship

Project plan

Action Points	Target Date	Completion Date
Identify your goals and expectations for the mentorship	Prior to first meeting	
Start collaboration and establish goals and expectations		
Hold introductory meeting face to face	First meeting	
Clarify roles and responsibilities		
Share each of your objectives and expectations		
Discuss agenda for the next meeting and action points		
Create an action plan	Second meeting	
Discuss mentee's strengths and identify short- and long-term development needs		
Complete the action plan template		
Discuss action items to be completed before the next meeting		
Act on and revise the action plan	Subsequent meetings	
Review progress on actions points established in the previous meeting		
Discuss items of interest, current challenges, recent success, etc.		
Every 4 to 6 months, assess the effectiveness of the relationship		
Discuss action points to be completed before the next meeting		

3.1 Set up expectations for your role in the relationship: understand **your role as a mentor**

In the beginning of the relationship it is essential to clarify what you can legitimately give through mentoring. It is particularly beneficial for the involved parties to discuss, negotiate and agree upon expectations. The table is an illustration of various roles of a mentor, effective and detracting behaviours.

Key Roles	Effective Behaviours	Ineffective Behaviours
Advisor	<ul style="list-style-type: none"> ✓ Acts as a sounding board and facilitator ✓ Maintains privacy/confidentiality 	<ul style="list-style-type: none"> ✗ Fixes problems ✗ Assumes responsibility for mentee
Protector	<ul style="list-style-type: none"> ✓ Supports, is a safety net ✓ Ensures a safe environment to take risks 	<ul style="list-style-type: none"> ✗ Fights mentee's battles ✗ Over protects
Developer	<ul style="list-style-type: none"> ✓ Gives structure and direction ✓ Provides guidance based on observations during interactions with mentee ✓ Empowers mentee to handle his/her problems independently 	<ul style="list-style-type: none"> ✗ Dictates, controls learning ✗ Looks for quick fixes ✗ Provides general criticism or judgment ✗ Tells mentee what to do
Broker	<ul style="list-style-type: none"> ✓ Identifies skill or competency gaps through a "third party" lens ✓ Identifies and facilitates development opportunities 	<ul style="list-style-type: none"> ✗ Allows personal biases ✗ Abdicates, does not follow up
Challenger	<ul style="list-style-type: none"> ✓ Positively provokes, pushes toward higher standards ✓ Helps mentee explore potential career opportunities 	<ul style="list-style-type: none"> ✗ Pushes too far too soon ✗ Discounts mentee's thoughts and opinions
Clarifier	<ul style="list-style-type: none"> ✓ Teaches organizational values and politics 	<ul style="list-style-type: none"> ✗ Removes obstacles so mentee does not have to deal with organizational politics
Affirmer	<ul style="list-style-type: none"> ✓ Gives needed support, enhances self-esteem ✓ Exhibits empathy and understanding 	<ul style="list-style-type: none"> ✗ Gives too much feedback ✗ Discounts mentee's feelings or concerns
Sponsor	<ul style="list-style-type: none"> ✓ Provides visibility and recognition of mentee 	<ul style="list-style-type: none"> ✗ Promotes mentee at the expense of others

3.2 Set up expectations for your role in the relationship: understand your role as a mentee

Core Performance Expectations

- ✓ Be willing to discuss failures and successes
- ✓ Demonstrate a genuine interest in mentor's support
- ✓ Demonstrate implementation of the acquired knowledge
- ✓ Exhibit a desire to improve in a certain area or learn a new skill
- ✓ Identify professional goals, priorities and interests
- ✓ Listen actively
- ✓ Provide honest feedback to the mentor
- ✓ Seek ways to achieve objectives and provide solutions to given problems

Time Commitment Obligations

- ✓ Be accountable for scheduling meetings with mentor
- ✓ Be respectful of mentor's time and schedule
- ✓ Commit the appropriate time and energy
- ✓ Do the necessary pre-work for mentorship meetings
- ✓ Follow up on action points identified during the meetings
- ✓ Keep in touch with mentor on regular basis

Mentorship Good Practices

- ✓ Attend mentorship related meetings and events
- ✓ Maintain privacy/confidentiality of interactions
- ✓ Provide input to assess and improve the mentorship program
- ✓ Benefit from available resources through the network
- ✓ Track progress

In the beginning of the relationship it is beneficial for the involved parties to discuss, negotiate, and agree upon expectations.

You must be an active learner in this relationship, but also an active participant in enhancing the development of your mentor. You must openly share your career goals, success, and failure, and receive a constructive feedback and advice.



3.3 Define your goals



Questions to Consider	Notes
What do you aspire to achieve in the next three to five years?	
What do you expect to gain from this relationship?	
What role do you expect your mentor/mentee to play?	
Are there any ground rules you would like to set (e.g., confidentiality, openness, etc.)?	
What are your greatest strengths?	
What are your greatest weaknesses?	
How would you like to go about achieving your learning/teaching goals?	
What items would you like to discuss in these meetings?	<input type="checkbox"/> Managing <input type="checkbox"/> Inputs from a Business Standpoint <input type="checkbox"/> Competency development <input type="checkbox"/> Short-term career goals and values <input type="checkbox"/> Long-term career goals and values <input type="checkbox"/> Network development <input type="checkbox"/> Specific insights <input type="checkbox"/> Other: _____
Are there any topics of urgent interest?	
Are any topics off limits?	
What do you think will be challenging about this relationship?	
What would you like the regular meeting schedule to be (length, time, frequency)?	
What criteria would you like to use to evaluate the success of the relationship?	

3.4 Create a foundation of a trustworthy relationship

In order to build a strong foundation for a mentoring relationship, it is critical to build trust and clearly establish expectations from the very start. This form will help both parties to guide the first mentoring interaction, which should help you get to know one another and set up mutual expectations and goals.

- **Personal and professional background**

- What is your educational and professional background? (including an explanation of your current role and how long you have been in the current role)
- What are your greatest strengths? Greatest weaknesses?
- What are your short-term career goals? Long-term career goals?
- What are your hobbies/interests outside of work?

- **Expectations**

- How do you see me as your mentor?
- What ground rules should we set? (e.g., confidentiality, openness, etc.)
- What topics are off limits? (e.g., performance reviews, personal lives)
- What do you think will be challenging about this relationship?
- Are there any topics of urgent interest?
- What topics do you want to cover in our conversations?
- What do you hope to gain from this relationship?
- How do you prefer to communicate in between our meetings?
- When is the best time for you to meet on a regular basis?

4. Maintain relationship: build an action plan

Mentee Name:		Mentor Name:		Date:		
Long/Medium-Term Career Goals:						
Objectives to Achieve Long/Medium-Term Career Goals (Strengths to leverage and weaknesses to address)	Mentee's Action Steps	Mentor's Action Steps	Support Network's Action Steps (Role of French Chambers, peers, etc.)	Potential Barriers (Risk mitigation steps)	Success Measures (Must be measurable and results-focused)	Target Completion Date(s)
Objective #1:						
Objective #2:						
Objective #3:						
Objective #4:						



4.1 Key discussion topics

Part I

The topics you discuss during mentoring sessions should be centered around the specific goals mentor and mentee agreed upon from the very start. The illustrative questions below provide a good basis for your initial discussion.

Professional Development

- Were you a success in your role recently? Can you elaborate why?
- When you need to persuade or motivate others, what is your strategy?
- Which relationships are particularly difficult for you at work?
- Where and how could you improve the effectiveness of your team?
- What tough decisions did you have to make in your job recently? What opportunities or challenges do you feel these decisions created for you?
- What decisions are the easiest for you to make and which ones are the most difficult? Why?
- What support / guidance do you need to achieve your objectives?



4.1 Key discussion topics

Part II

The topics you discuss during your mentoring sessions should be centered around the specific goals mentor and mentee agreed upon for the relationship. These illustrative questions below provide a good basis for your initial discussion.



Career guidance

- What prompted you to take this opportunity?
- What skills / knowledge / information would you like to acquire or develop?
- What do you see as the next logical step in your career? What doubts do you have about this next step?
- What is your long-term vision for yourself?

Personal development

- What are your current strengths and development areas? Which steps are you taking for potential improvement? How is it impacting your business?
- What individuals, books, experiences, or events have most impacted who you are?
- What are you passionate about (work-related or not)?





4.2 Identify effective mentoring activities to do with your **mentee**

Skill development

- Suggest that your **mentee** should establish 1-3 objectives, preferably skills, to work on them with you.
- Invite your **mentee** to some of your key meetings or have him/her observe you as you work.
- Observe your **mentee** giving a presentation; get permission to offer feedback privately.

Knowledge sharing

- Share a difficult decision you made recently and discuss what you took into consideration when making this decision, as well as its' outcome. Ask your **mentee** what he/she might have done differently.
- Ask for your **mentee**'s advice about a project or a problem that you are facing.
- Explain some of the “unspoken rules” you have learned about being successful in your organization.

Networking

- Introduce your **mentee** to at least 2 people who could be helpful to him/her.
- Get together with other mentoring pairs for lunch or another activity.
- Occasionally call your **mentee** unexpectedly, just to check in.
- Do volunteering work together.

Career advice

- Offer to tell your career story in detail. How did you start your career? What changes did you make along the way? Include positive and negative aspects and how these learnings helped you.
- Review your **mentee**'s CV. Provide specific suggestions.
- Help your **mentee** search for alternatives.



4.2 Identify effective mentoring activities to do with your **mentor**



Skill development

- Offer to teach one of your strengths or skills, or share knowledge about your role and function.
- Ask to observe your **mentor** while he/she presents in public. Take notes and discuss what you learned.

Knowledge sharing

- Share a difficult decision you made recently and discuss what you took into consideration when making this decision, as well as its' outcome. Ask your **mentor** what he/she might have done differently.
- Ask for your **mentor's** advice about a project or a problem that you are facing.
- Explain some of the “unspoken rules” you have learned about being successful in your organization.
- Discuss an article or a book that influenced your personal or professional life.

Networking


- Occasionally call your **mentor** unexpectedly, just to check in.
- Get together with other mentoring pairs for lunch or another activity.
- Do volunteering work together.

Career Advice

- Review your **mentor's** CV and ask him to provide comments about different stages of his career
- Tell your career story in detail. How did you start your career? What changes did you make along the way? Include positive and negative aspects and how these learnings helped you.



4.3 Checklist for an effective mentoring relationship



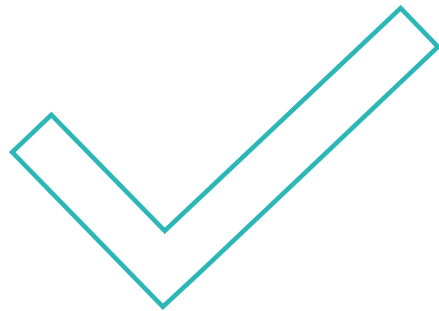
- Set a reminder in your calendar to send a meeting invite for each month.
- Prior to each meeting, create an agenda summarizing the topics you would like to cover
- Email an agenda the day before each meeting to ask for input
- Contact the mentor/mentee proactively if any meeting has been scheduled.
- Hold meeting face to face
- Offer to invite mentor/mentee to a meal or a coffee
- Agree on the next steps at the end of each discussion and clarify who is responsible for each of them. If follow-up is a challenge for either of you, use the opportunity to solve the problem together
- After each meeting send a note describing how you benefited from the conversation
- Set a reminder on your calendar to send an interesting article to your mentor/mentee each week/fortnight
- Note important personal events in the life of your mentor/mentee, such as birthdays
- Share information on educational events (internal or external) together such as lectures, talks, seminar etc.
- Share information on your culture and challenges in the workplace from cultural an value dimensions
- Suggest ideas about new hobbies



4.4 Assess the relationship success

Questions to Ask Your Mentor/Mentee	Notes
Are we meeting with the appropriate frequency and for the right length of time?	
Are you following-up on our action points established after each meeting? Am I doing a good job following up on mine?	
What do you like most about our mentoring relationship? What do you like least?	
Are you learning from this relationship?	
Do you feel that I am challenging your behaviours and assumptions, not you as a person or your intellect? (ask the mentee) Am I providing you with the right kind of support? Enough support? (ask the mentee)	
Am I helping you see the big picture? (ask the mentee)	
What skills are you building as a result of this relationship ? (ask the mentee)	
What could I do differently to help you get more out of this relationship?	
Are we meeting the goals and objectives you set up at the beginning of the relationship? (ask the mentor)	
Are there any changes we should make to my Action? (ask the mentor)	
How are we progressing on the goals and objectives we set up at the beginning of the relationship ?	

4.5 Review of the mentoring experience: feedback



- Have you reached your goals in terms of objectives?
- Have your expectations been fulfilled?
- How far are you in your action plan?
- What actions/activities have you taken to be where you are now?
- Has the mentoring been effective for both parties?
- What have you learned/benefited from this mentoring relationship?
- What have you found challenging during the process?
- Which opportunity have you been given?
- Which decisions did you make to achieve a goal or a to reach a milestone?
- What do you see as a next step or a challenge?
- What have you learned from your mentor/mentee?
- What have you learned from your role as a mentor/mentee?

