Mentor Guide

Being a Mentor

Benefits

Mentoring is a valuable tool to help develop CMU's most important asset: our people. A successful mentoring process depends on the partners sharing common goals and expectations, committing to the mentoring practice, and giving and receiving trust and respect.

Both the mentor and the mentee give and grow in the mentoring process. In sharing your expertise, you are guiding another's career path. This also gives you an opportunity to review and re-energize your career goals.

Mentor benefits include:

- Personal satisfaction from helping someone grow professionally
- Learning and gaining new perspectives from the mentee
- Building new relationships
- Developing your skill as a *teacher* - helping someone clarify their career goals
- Developing your skill as a *guide* - helping someone navigate the workplace
- Developing your skill as an *advisor* - helping someone find their strengths and weaknesses
- Building your leadership skills and becoming recognized as an advisor
- Developing talent for potential promotions or leadership roles

Responsibilities

Development of your mentee depends on exploring their career aspirations, strengths and weaknesses, as well as creating objectives, implementing strategies and evaluating their progress along the way. Mentors provide a "light" for the mentee to follow by sharing their wisdom and past experiences.

Here are a few guidelines to help:

- Support the mentee's development of professional and interpersonal competencies through strategic questioning, goal setting and planning
- Create a supportive and trusting environment
- Agree to uninterrupted time with your mentee
- Actively listen and question
- Give frank and constructive feedback to the mentee on their goals, situations, plans and ideas
- Encourage your mentee by giving them genuine positive reinforcement
- Serve as a positive role model
- Openly and honestly share "lessons learned" from your own experience
- Keep discussions on track
- Respect your mentee's time and resources

Starting the Journey

Your program manager will make email introductions for each mentorship pair.

Agenda for Initial Contact

Whether via phone, email or Zoom, your first contact, which is mostly task oriented, will lay important groundwork. In your first conversation:

- Introduce yourself, let your mentee know how you prefer to be addressed and ask how they would like to be addressed. Learn how to pronounce their name.
- Share some things about yourself.
- Discuss scheduling needs, expectations and limitations you may have.
- Agree on a meeting schedule (initially every two weeks) and whether you will meet via phone, Zoom or in person.
- Talk about respecting each other's time and how best to cancel or reschedule a meeting. Keep changes to a minimum.
- Agree on how to request impromptu check-ins between meetings.
- End the meeting on a positive note, noting that you are looking forward to working with your mentee.
- Ask your mentee to develop an agenda for your next meeting and to share it with you in advance. Discuss how each of you sees your roles and responsibilities.

Relationships take time and work. The first few months of your mentoring experience should focus on building a trusting, respectful relationship.

Developing the Partnership (0 to 2 months)

The first few months of mentoring will likely be spent getting to know each other. This is the time to clarify expectations for the relationship and to understand each other's skills and perspectives. Do not rush through this phase, as it is critical to the long-term success of the mentoring relationship.

Meeting Agendas

While the mentee will be developing an agenda for each meeting session, it is important that you both have a clear idea of what that agenda should look like. The goal is to engage your mentee in meaningful conversation from the start, going beyond job responsibilities and titles, and focusing on each other as people – your histories, cultures and interests. You can begin to share some of your personal and professional journey with your mentee, continuing to do so throughout your partnership.

Ask your mentee to describe where they see themselves headed in their career, and in broad terms, what their development goals are. Ask them questions about how their goals align with where they want to be. Try to gain clarity but be careful to not appear judgmental.

Talk about your personal communication and learning styles and ask your mentee about theirs. Clarify what each of you are hoping for from the mentoring relationship.

Before concluding each meeting, review the agenda and what you accomplished at the meeting. Talk openly about whether you had substantive versus superficial discussions and whether you believe you are advancing in your level of trust. Finally, agree on next steps and the next meeting agenda.

Remember the goal of this period is to build a strong foundation of trust. This will take multiple conversations over approximately two months.

Before moving on to the next phase, you may want to use the checklist below to assure that you have established a firm foundation of trust and understanding.

Checklist Before Moving On

- Am I truly invested in my mentee?
- Are we communicating openly and honestly?
- Do we understand and agree upon each of our roles in this relationship?
- Can I commit to adequate time to help this person?
- Am I committed to continuing to evaluate and develop my mentoring skills to help my mentee?

Agenda Topic	Conversation Ideas
Introduction	• Have your mentee tell you about themselves. • Share a little of your personal journey. • Talk about each other's current professional situation. • Talk about each other's leadership values and philosophies. • Begin to discuss ground rules that may assist in building the relationship.
Getting to Know You *(multiple meetings)*	• Share some previous mentoring experiences with each other. What did you like/what didn't you like? • Share why each of you want to engage in this relationship. • Discuss what each of you sees as your role in the relationship and if your views differ, how to resolve or how the differences may impact the relationship. Determine exactly what your mentee is trying to accomplish. • Ask your mentee where they see themselves headed in their career. • Have the mentee share their broad development goals and how these relate to where they see themselves headed. • Discuss your learning style and both of your personal communication styles.
Ending Each Meeting	• Discuss expectations regarding open and honest feedback with one another and ask for that feedback at the end of every meeting. • Agree upon next steps and the next meeting agenda.

Defining the Goals (2 to 4 months)

During this phase, try to meet twice a month, if possible. While it is important to continue building the relationship, the focus during this period is helping your mentee clarify their goals and develop an approach to work toward those objectives.

You may want to detail agreed-upon goals and other partnership commitments in a written agreement. This can help maintain focus during the mentoring partnership. A sample is included at the end of this section. If you do decide to use an agreement, keep it simple.

Meeting Agendas

Mentees often have broadly defined goals. If that's your case, your role as mentor is to help make those goals as Specific, Measurable, Achievable, Relevant and Time-Bound (SMART) as possible by asking questions to clarify your goals and objectives.

For example, their goal may be to move into a position with a better title and higher salary within the next year. You might ask "What do you mean by 'better title'?" and "What do you think is needed to reach that goal?" Your role is not to challenge or question the goal validity, but to define the goal as they do.

Work on examining the gap between your mentee's professional goals and what their desired position offers, as well as examining what they bring to the table in relation to what the position requires. This gap analysis can form the basis of an agreed-upon approach to reach your mentee's objectives.

Effective Questioning

As a mentor, it can be tempting to jump in and solve your mentee's problems for them. Your role, however, is to help the mentee think for themselves, encouraging them to do so by asking thought-provoking, open-ended questions.

Try to be a Questioning Coach, using questions to help your mentee reflect on their experiences and learn from yours. This will give you an opportunity to:

- Uncover additional facts and information about your mentee
- Confirm your mentee's goals, aspirations and needs
- Explore strong feelings about situations
- Define problems and possible solutions
- Discover your mentee's commitment to their growth

Exploratory questions:

- What are the most interesting aspects of your job?
- What do you want to gain from your current position?
- What do you want to be known for?
- If there are obstacles, what do you understand the issue to be?
- What tells you that your assessment is correct? What are other people's perceptions of this issue?
- What assumptions are you making here?

- What other ideas do you have?
- How long has this been an issue?
- What did you learn from past experiences that you didn't expect to learn?
- What are the reasons behind an issue?
- Have you tried to resolve this issue before? Why or why not? If yes, what was the result?
- What choices do you have?
- What progress have you made?
- What other ideas do you have?
- How are you using the things/ideas we've spoken about?
- What results are you looking for?

Empowering questions:

- What skills do you want to develop?
- What strategies come to mind when looking at a situation?
- What do you see as possible solutions?
- What outcomes are you after here? Are these outcomes reasonable given the circumstances?
- What resources are available to help you move forward?
- What key players do you need help from?
- What forces may help and/or hinder you?
- What other information do you need to arrive at a solution?
- What are the pros and cons of each solution?
- What is the first step you need to take to achieve your preferred outcome?
- What alternative strategies should you develop?
- How will you know you have mastered or successfully enhanced a competency?
- How will you apply your new skill?

Ask more questions to thoroughly understand the responses you've been given. Rephrase their answer to ensure you have heard the reply correctly.

Most importantly -- ask more questions and give fewer answers.

Checklist Before Moving On

- Goals are clearly defined and understood by both mentor and mentee.
- Mentor and mentee have agreed to meeting routinely, the ground rules for the relationship and the preferred feedback method.
- A strategy is in place that is based on learning objectives, with timelines for completing the work and periodic checks to re-evaluate and modify the plan.
- I remain committed to my mentee and to continuing to evaluate and develop my mentoring skills.

LinkedIn resources are available to assist with effective goal setting.

Sample Mentoring Partnership Agreement

The goals and objectives of our mentoring relationship are as follows:

1. _____

2. _____

3. _____

We have discussed the protocols by which we will work in partnership. To ensure that our relationship is a mutually rewarding and satisfying experience, we agree to:

1. Meet regularly. Our specific schedule of contact and meetings, including is as follows:

2. Look for multiple opportunities and experiences to enhance the mentee's learning. We have identified, and will commit to, the following specific opportunities and venues for learning:

3. Maintain confidentiality of our relationship. Confidentiality for us means:

4. Honor the ground rules we have developed for the relationship. Our ground rules are:

5. Provide regular feedback to each other and evaluate the progress. We will accomplish this by:

We agree to meet regularly until we accomplish our predefined goals or for a maximum of nine months. At the end of this period, we will review this agreement, evaluate our progress and reach a learning conclusion. The relationship will then be considered complete. If we choose to continue our mentoring partnership, we may negotiate a basis for continuation, so long as we have stipulated mutually agreed-upon goals.

If one of us believes it is no longer productive for us to continue, or the learning situation is compromised, we may decide to seek outside intervention or conclude the relationship. In this event, we agree to use closure as a learning opportunity.

Mentee's signature and date _____

Mentor's signature and date _____

Working Toward the Goals (4 to 8 months)

This period is often considered the most productive part of the mentoring relationship. You have laid a foundation for trust and open communication and committed to ground rules and expectations. You have a mutually agreed-upon strategy in place to aid in meeting your objectives. During this period, you might meet once a month with updates in between.

In this phase, you will focus on supporting and challenging your mentee to grow and develop. It is important that you support your mentee by listening objectively and without judgment, allowing your mentee to speak freely. You might start asking your mentee questions that will cause them to reflect and articulate their thinking. If you have had similar experiences, share relatable stories from your personal journey and express positive encouragement.

To maintain the forward momentum of the mentoring relationship, you will need to support and challenge your mentee to do things that may fall outside their comfort zone. This can take the form of setting tasks, such as:

- Shadowing events: “Take your mentee to work”. Include your mentees in meetings, presentations, etc. when possible and appropriate. Look for opportunities to include your partner in what you do. Your mentee will be able to observe you and how you demonstrate your strong competencies.
- Work sharing: Look for or design learning assignments where your mentee can assist you with projects to better understand your contribution to the organization.
- Hands-on training: Find opportunities to share specific knowledge and introduce your mentee to new work within the organization.
- Networking: Look for opportunities to introduce your mentee to key players or to others to broaden their perspective on the organization.

Whatever you do, do not allow your mentee to lose sight of their goals and encourage them to continue moving forward. Recognize, however, that you may want to talk with your mentee about stepping back and re-evaluating their goals and objectives, possibly reframing them.

Feedback is critical to this phase in the mentoring relationship. It is the most powerful way for learning to occur. Remember to provide your feedback honestly, while being supportive and encouraging. Stay focused on the issue or situation to allow teachable moments to be explored. Your goal is to help your mentee achieve their learning objectives.

Meeting Agendas

Your meetings should switch focus from identifying goals to achieving them. Each meeting should begin by reflecting on the previous one. Your mentee should update you on their current situation, particularly as it relates to the plan and any progress they've made toward their objectives: what is working, what is not and how they are feeling about it, etc. Stay focused on the plan and on the partnership, which is their growth and development.

Checklist Before Moving On

- Mentee is still learning and growing.
- Mentee is still moving forward in pursuit of their goals.
- The feedback I am giving is honest, thoughtful and constructive.
- We are continuing to build and maintain a productive relationship.
- I am still committed to my mentee and to continuing to evaluate and develop my mentoring skills.
- There are no subjects that seem too difficult to discuss in the relationship.

Agenda Topic	Conversation Ideas
Start of Each Meeting (Past Focus)	• What did we do at the last meeting? • How do each of us feel about it? Are there things we might have done/said differently now that we have had time to reflect? • Review any action items that were agreed upon.
Majority of Each Meeting (Current Focus)	• Ask the mentee to provide an update on their current situation, particularly as it relates to the plan. • Review mentee-provided progress report on action plan items. • Discuss what's working and what is not working relative to the action plan as it relates to achieving the goal. Discuss how the mentee is feeling about their progress and the plan. • Revise objectives and action plan if needed.
Ending Each Meeting (Future Focus)	• Agree on actions to be completed before the next meeting. • Discuss expectations regarding open and honest feedback with one another and ask for that feedback at the end of every meeting. • Agree upon next steps and the next meeting agenda.

Phase Out / Closure (Final Month)

As mentioned in the sample Mentoring Partnership Agreement, closure may come at any point during the relationship. The agreement asks both parties to openly evaluate the relationship, and if either party finds reason to end the mentoring partnership, it will be thoughtfully discussed. Both parties go into a mentoring relationship with positive intentions, but sometimes the relationship is not successful. It is important to remember that while your formal mentoring interaction may end, the personal and professional relationship you have built with your mentee can continue to grow. That is, in fact, one of the benefits of mentoring!

Formal closure, even after a successful mentoring relationship, can be challenging and stressful. When one or both partners consider ending the relationship, it is important to discuss it together. Reasons for concluding the agreement can vary, such as:

- One person in the relationship has experienced a life or job change that shifts their attention and ability to focus on the mentoring relationship.
- Although the relationship may have been professionally fulfilling for both, it has successfully run its course and consequently grown stale.
- One or both of you may find it more comfortable to maintain the status quo than to engage in potentially awkward discussions and end up avoiding topics to prevent hurting feelings.

No matter the reason, appropriate closure is important for both parties. It is best to discuss the closure at the beginning of the partnership and periodically throughout the relationship. You may wish to add an item to your agenda every few months to check in on the health of the partnership.

As previously mentioned, the end of the formal mentoring partnership does not mean the end of a relationship, be it as a friend or colleague. Work to have an honest conversation. Provide your mentee with your rationale for terminating the mentor/mentee partnership, listen to what they say carefully and respond to their thoughts in a non-defensive, non-judgmental manner.

As the mentoring relationship is one of learning, growth and development, the partnership's end should serve as a learning conclusion. The ideal ending conversation should focus on the learning that took place during the relationship – not just the mentee's learning, but also what you learned as a mentor. Look at the benefits and challenges of the relationship and make every effort to have the ending be positive.

Summarize the Learning

The healthy discussion at closure provides you and your mentee with the opportunity to evaluate the learning outcomes and hopefully discuss how they might build on their learning as they move forward in their career and life. Look back over the goals that were developed early in the mentoring relationship. Then discuss what was learned/ accomplished relative to each objective. For example, if one of the objectives was to prepare the mentee for a position with greater responsibility, ask them to describe the progress they feel they have made toward that objective.

You may be surprised at what you have learned about yourself through mentoring, as well. Share with your mentee what you have learned, offer your perspective of the learning that has taken place, and ask your mentee if their perceptions are similar. That conversation may go something like this:

Mentor: I have observed that you have grown surer of yourself over the past year.

Mentee: You know, you're right. I do feel more confident and am now giving my opinions more often at meetings.

Mentor: That's terrific! You have taught me a lot about patience and the importance of listening this year. I am finding that my leadership team is being more open with me, so thank you.

Most of us have had mentors at different points in our lives. Many of them have remained a friend or colleague that we touch base with periodically or think of with fondness from time to time. Ending the formal mentoring relationship should be done in a way that is focused on the future and leaves the relationship open to evolve into something different.

Celebrating

Most of us don't take the time to celebrate an achievement, often looking at something as done and moving on to the next thing. However, celebration at the end of the mentoring relationship is important as it reinforces the learning that has taken place and helps with transitioning to the next phase, much like a graduation ceremony.

Some suggestions for celebrating may include a face-to-face get-together if you have been mentoring via electronic methods. A written note expressing your gratitude to your mentee can be an expression of celebration, providing a permanent reminder of the relationship and its successes. You and your mentee may wish to exchange a meaningful memento. Any mementos should not be expensive – perhaps a book of reflections that will help continue the learning that began during the mentoring relationship.

The Future

Take the time to be honest about whether there will be a future relationship.

If you do wish to continue the relationship, agree whether it should be touching base periodically over email or phone or something more.

Whatever you agree about the future relationship, know that each of you will likely feel a loss. You have bonded over the past year or so, confided in each other and learned together. As a mentor, you may wonder how your mentee is doing. They may miss the support and feedback you provided. The good news is that you will likely hear from each other to share accomplishments or milestones when you least expect it over the years.

Now that you have agreed upon your future relationship with your mentee, it is time for you to do a self-evaluation. See the sample self-assessment at the end of this section. Ask yourself: How has this mentoring experience changed you? What did you learn from this relationship? How can you use what you learned in future mentoring relationships? Are you ready to be a mentor again?