

MAKING THE MOST OF DEVELOPMENTAL MENTORING

A practical guide for mentors and mentees

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Making The Most Of Developmental Mentoring: A Practical Guide For Mentors And Mentees

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About the author

This practical guide has been prepared by Prof David Clutterbuck, a global authority on mentoring. David brought the concept of supported mentoring to Europe in its earliest days, in the early 1980s. He is author or co-author 55 books (see Further reading and resources), about a third of them in the area of coaching and mentoring. Visiting professor in the coaching and mentoring faculties of both Sheffield Hallam and Oxford Brookes Universities, he holds a PhD by research, in mentoring. David co-founded the European Mentoring and Coaching Council (EMCC) and its predecessor organization, the European Mentoring Centre. He is a lifetime ambassador for the EMCC.

David chairs the International Standards for Mentoring Programmes in Employment. He was voted *Coaching at Work's* first Mentor of the Year and is among HR Magazine's top 15 HR most influential. He has worked with thousands of organisations around the world in developing effective, sustainable mentoring programmes. He lives in Berkshire, England.



CHAPTER 1:

What do we mean by mentoring?

The term Mentor has its origins in Greek mythology, but there are parallel stories in many cultures. In the *Odyssey*, King Odysseus is guided in his long journey home to Ithaca by Athena, the goddess of wisdom. Athena also guides Odysseus' son, Telemachus, when he sets out to find his father, and takes the guise of an old courtier, Mentor. Some of the interesting aspects of this story are that:

- The original mentor was a woman (the old man Mentor was spectacularly useless!)
- Athena also had manifestations that related to high levels of challenge (she was the goddess of martial arts) and nurturing – two opposite behaviours that together drive the mentoring relationship
- Athena helped Odysseus and Telemachus on journeys they chose to make – she didn't expect them to follow her path or defer to her experience.

Over the centuries, mentoring has been associated with apprenticeships and other forms of learning between generations. In the early 1980s, a small number of companies in the US decided to formalise the informal mentoring that was happening in their organizations. In this model, a powerful and experienced person (usually in business, the professions or higher education) adopted someone much younger, who was just starting out their career in the same discipline or organization. The attraction of the younger person was, to a greater or lesser extent, bound up with mentors recognising themselves 20 or more years earlier. The more junior partner, the protégé (literally, someone protected) was attracted by the mentor's experience, wider perspectives, connections and power to influence their career. Definitions at the time talk of “overseeing the career of a young man”.

This form of mentoring has come to be known as sponsorship mentoring. One of its key characteristics is that the learning is mostly one way. Another is that mentors tend to expect some degree of personal loyalty from the mentee. It is also common for long-term sponsorship mentoring relationships to bust up spectacularly, if the mentor does not encourage the protégé to outgrow them.

Supported or structured mentoring was rapidly imported into Europe, where it had a mixed reception. In France, for example, there was already a well-entrenched and powerful system of elite informal relationships between old and

young graduates of the Grands Lycees. In the UK, Eire, Holland and Scandinavia, sponsorship mentoring simply didn't fit cultures, where the emphasis was on helping people manage their own careers. In those countries, a very different model of mentoring emerged – one based on a greater level of two-way learning and on helping the more junior partner (called a mentee) with the quality of their thinking about issues important to them. This model is usually called developmental mentoring.

Both models of mentoring can be seen around the world, both in their “pure” form and in various combinations. Because the expectations of mentors and mentees can be very different, it is important in any mentoring relationship to define what model of mentoring is being applied.

A “mentoring” story from East Africa

A young boy's father is dying. He tells his son: “Under the big rock outside the kraal is everything you will need to become a great warrior.” Encouraged by his mother, every day the child attempts to move the rock. Although he pushes with all his strength, it does not budge. Eventually, at the age of 16, he feels a small amount of give. Then at 18, he rolls the rock away and finds underneath it a sword and shield. “How will this make me a great warrior?” he asks, disappointed. “Just look at your muscles,” says his mother...

Other common forms of mentoring are peer mentoring (where there is no hierarchical difference between the parties, simply a difference in experiences) and reverse mentoring (where the mentor is hierarchically more junior than the mentee). Reverse mentoring occurs particularly in technical areas (many executives have a junior IT mentor) and in support of diversity programmes. For example, in the UK Cabinet Office relatively junior black and minority ethnic mentors help leaders gain insights into diversity issues, through open dialogue and offering different perspectives.

Some definitions of developmental mentoring

- Off-line (i.e. not in a boss-subordinate relationship) help by one person to another in making significant transitions in knowledge, work or thinking (Clutterbuck, D, 1985, Everyone needs a mentor, CIPD, Wimbledon)
- Helping someone with the quality of their thinking about issues important to them (Clutterbuck & Megginson)
- Mentoring is a helping relationship based on an exchange of knowledge, experience and goodwill. Mentors help someone less experienced gain

confidence, clearer purpose, insight, and wisdom. In developmental mentoring, the mentor, too, is changed by the relationship.

- Mentoring is a strategic development activity that supports the organization's vision, goals and values and the participants' needs and wishes (Kirsten Poulsen, *The Mentor+ Guide*, KMP+ Forlag, Copenhagen)

What's the difference between coaching and mentoring?

There is a lot of vested interest by people who promote particular services, to claim the moral high ground for whatever they do. So it is easy to find exactly the opposite distinctions being claimed for both coaching and mentoring with equal forcefulness. The reality is a lot more complex. Just as there is more than one model of mentoring, so there are at least two very different models of coaching. The oldest and most widespread, sometimes called traditional coaching is, like sponsorship mentoring, relatively directive – the coach is in charge and is typically either the person who sets targets and standards, or their representative. Much sports coaching fits this model, for example. In traditional coaching, the coach tells the coachee what to do, observes them and gives feedback on how they perform. Effective traditional coaches also help people experiment, reflect and develop the skills of self-feedback.

More recent is developmental coaching, which works on the learner's own agenda and – at its most powerful – helps the learner have the conversation they need to have with themselves. One of the many sources, on which developmental coaching draws, is developmental mentoring.

So what are the similarities and differences between developmental coaching and developmental mentoring? As the table below shows, the differences are more of degree and nuance than absolutes. As a mentor, you may from time to time find yourself being drawn into what you may think of as developmental coaching. The mind frame and approach of developmental coaching and developmental mentoring are so similar that you may not even notice the transition. A move from developmental mentoring to sponsorship mentoring or to traditional coaching may be more problematic, as it may cut across organizational policy and may reduce the mentee's level of openness and honesty in your conversations. (People tend to be less forthright about their weaknesses to those who have influence over their careers.)

Similarities

- Focus on the quality of the learner's thinking

- Coach/mentor uses their experience to craft powerful questions
- Advice-giving is permissible, but not as a first resort and only in specific circumstances (A common complaint about ineffective coaches is their over-rigid adherence to never giving advice.)
- Much of the learning occurs in the reflections of the coachee/mentee between or long after sessions
- Coach and mentor both have a duty of care towards the coachee/mentee

Differences

- Mentors more likely to make introductions, help develop networks
- Mentors more likely to help explain politics of an organization or profession
- Coaches (in the workplace context of line manager to direct report) more likely to give feedback
- Coaching tends to be a short- or medium-term *assignment or activity* focused on performance in a defined field
- Mentoring tends to be a medium- to long-term *relationship* focused on career or more holistic, less well-defined issues
- Coaching more often a paid arrangement

Mentoring as personal reflective space

Everyone has issues that they need to create time to think through. Usually it is quiet, uninterrupted space, with few distractions. People find “personal reflective space” in all sorts of situations, commuting to and from work, walking the dog, in the bath or shower, at the gym, doing repetitive household chores – almost anywhere but at work! When we go into this internal dialogue, we follow a distinct pattern. First, we select a SUI (significant unresolved issue) to think about – or more usually, the issue selects us, instinctively coming to the fore of our attention and taking over most of the brain’s conscious executive functions and many of the unconscious ones. People have a remarkable capacity to store SUIs (to put them on the back burner till we have time to think about them). Under normal circumstances, most people in complex job roles can store up to 25 (and

in some cases, 35) before their performance and stress management deteriorate observably.

What do we mean by mentoring?



What do we mean by mentoring diagram. External energy vs internal energy.

Next, we use the quiet space to try to understand the issue – to put boundaries around it (that is, to *frame* it), define the context and clarify how we feel about it. Having, at least to some extent, understood what is happening and why it is important to us, we explore the *implications*. For example, would it really matter that much if we did nothing about this issue? Typically, this stage takes us deeper into our emotions and our understanding of the interconnections within the issue.

These reflections can either take us back into framing (you can go round the cycle quite a few times, if there are complex choices to be made) or stimulate a sudden insight – an “Aha” moment! That allows us to view the issue from a different perspective – to reframe it – which, in turn, gives us new options for managing it. As we solidify these options into plans of action, we often experience a sudden burst of physical energy. This is because our mind has been turned inwards as we reflected, and then returns to its normal outward perspective. People who habitually do their reflective thinking during repetitive sporting activity (for example, jogging or swimming) often report that they move faster as they emerge from reflective space.

When we have these “conversations with ourselves”, it is a powerful important part of effective functioning. It helps to focus our activities and reduce stress. The role of a mentor is to join us in that conversation, bringing new perspectives, asking questions that stimulate our thinking. On the first half of the curve, the

mentor helps the mentee work through the issue – what is happening and why, how they feel about it and so on. Once the mentee has sufficient insight (and this doesn't always have to be a dramatic flash of understanding), the mentor helps them work out practical ways of using that understanding to bring about better outcomes than might otherwise have been the case.

The mentoring conversation can be much more effective when mentor and mentee begin by assessing where the mentee has already got to on the curve of reflective space. A classic mentoring question to begin a conversation with is therefore: *Where have you got to in your thinking about this issue so far?*

A developmental mentor...

- Has wisdom and experience, but uses them less to impart knowledge than to help the mentee become courageous and wise
- Is an expert only in the sense of knowing the limits and narrowness of their knowledge. (An expert is someone, whose existing knowledge hinders their new learning.)

CHAPTER 2:

Applications and benefits of mentoring

The most common applications of mentoring in employer organizations are to support:

- New entrants to an organization, especially at junior levels and as graduate recruits – though mentoring is increasingly used in the on-boarding of senior executives, where the costs of failure are much greater
- Major transitions of role – for example, from managing a team to managing managers
- Diversity management and equal opportunity programmes.

There is also a wide and diverse range of applications supporting people in the community. For example:

- Helping teenagers at risk keep out of trouble, engage with school and create a future for themselves
- Supporting immigrant professional women with AIDS to regain confidence and find employment
- Helping people with dyslexia, disability or other forms of disadvantage find employment
- Encouraging black students to complete their university courses.

The impact on these programmes on people's lives is often very significant. Many people, who have been mentor or mentee in a corporate environment, go on to become community mentors – and sometimes vice versa.

Benefits for mentees

Mentees come to a mentoring relationship from a wide range of circumstances and backgrounds, and the benefits they may be looking for can be just as varied.

Some of the most common benefits include:

- Being able to discuss and gain greater clarity about career and development issues, in an open and off-line environment
- Having an opportunity to reflect on their own progress and resolve their own problems in their own timescale
- Providing encouragement to set more ambitious career goals, reinforcing belief in their own potential
- Having practical advice and help on organisational politics and behaviour (understanding the formal and informal structures of the organisation)
- Having a role model e.g. for motivating others
- The opportunity to be challenged constructively
- Improved professional and personal networking
- Transfer of knowledge and, in particular, judgment.

Research suggests that mentees achieve greater confidence in their own potential and ability, and feel more secure in their role due to their involvement in mentoring. Additionally, having a mentor has been a critical factor in the career success of 80% of UK chief executives, and case studies from Australasia, South Africa and North America support this general picture.

Mentors are particularly valuable when people have to make significant role transitions. The book *The Leadership Pipeline* (Ram Charan et al, John Wiley, New York, 2001) identifies six major transitions (it calls them “passages”) in leadership careers. The first four of these are:

- From managing self to managing others
- From managing others to managing managers
- From managing managers to managing a function
- From managing a function to managing a business.

Each passage requires a significant change in how you think and behave, how you identify and solve problems, the time horizons you work to and the kind of judgements you make. Perhaps the key function of a mentor is to help you find your path through these changes, sharing where necessary some of their own experiences of the same transition.

Of course, not all transitions are upwards. Any unfamiliar role provides a potential opportunity for mentoring, which will speed up the time it takes you to be fully up to speed.

Benefits for mentors

The most common benefits for mentors include:

- Their own learning from the mentoring experience – mentors often report as much and sometimes more learning than mentees
- The opportunity to practice good developmental behaviours and additional skills outside their direct line responsibilities
- Development of their own self-awareness
- Greater understanding of other areas of the business and/or of other cultures
- Opportunities to capture and reflect on their own development
- Enhanced job satisfaction – stimulating and rewarding fresh challenge, sense of pride in mentee's achievements
- Consolidating and extending professional and personal networks
- Getting to know up-and-coming talent
- Reinforcement of their own good practice (explaining things to a mentee helps the move from unconscious to a higher level of conscious competence).

Mentors also describe feeling more confident in their roles and often comment on the satisfaction derived from being a small part of someone else's success.

Benefits for line managers

The line manager is an essential stakeholder in the mentoring relationship and their understanding of the benefits of mentoring will help them in supporting the development of their direct report.

Line managers of mentees in effective mentoring schemes comment on the following benefits:

- The value of having a second opinion from someone independent who does not have a direct involvement in the mentees work

- Improved self awareness of the mentee
- Better relationships between the mentee and their peers, and with the line manager him/herself
- Greater clarity, sense of purpose and direction on the part of the mentee
- Deeper, more effective dialogue in appraisals
- Increased opportunities to delegate tasks to the mentee.

Sometimes line managers are concerned that they will in some way be exposed by the conversations between mentor and mentee. This can make them reluctant to support the mentoring relationship, so mentor and mentee both have a duty to reassure the line manager, helping them to understand the benefits the relationship will bring to them.

Benefits for the organisation

Organizations have used mentoring as the starting point for many types of change. Establishing mentoring relationships helps build trust and overcome cultural differences and has helped a number of organisations cultivate a culture strongly supportive of individual and team excellence. Improving leadership skills in mentors and growing confidence, competence and engagement in mentees, makes people better skilled and more self-aware, positively impacting organizational performance.

Mentoring has also been well evidenced to impact positively on an organisations' retention, recruitment, succession planning, communication between silos and diversity management.

CHAPTER 3:

Is mentoring for you?

Here's a simple test to see if you would benefit from *having* a mentor. Simply tick which of the following apply to you. If the answer is yes to any of these, then you will gain from having a mentor. The more that strike a chord, the more useful mentoring will be for you.

- I'm not sure what I want in the next stage of my career
- I often feel that I am not truly in control of my career
- I often have to make difficult decisions that I can't discuss completely frankly with other people inside my organization
- It sometimes feels lonely in my job role
- I sometimes struggle to determine what the ethical decision is
- I know I could/should put more time and effort into my own personal development
- The next stage in my career will require a substantial shift in what I do and how I think – but I don't know what I don't know
- I would value learning from somebody significantly more experienced in my field, or in an area of knowledge I need to acquire
- Sometimes I need a sounding board outside the business/my department
- I'd really value space and time to think creatively about my role and responsibilities
- I'd like to grow my skills of developing others
- I need to re-evaluate what I do and why I do it
- I feel our team meetings could be a lot more productive than they are currently
- I'd like to be challenged in my thinking more
- I am sometimes held back by lack of confidence/self-belief

- I need to be more effective at managing the politics of my organization, while remaining authentic
- I need to build the scope and quality of my networks.

Now here's a simple test of whether you could usefully *be* a mentor. Again, if you check any of the statements, you have something to offer. The more statements you agree with, the more helpful you can be:

- I enjoy and have a good track of developing other people
- I am strongly motivated to maintain my own learning and personal growth
- I have reflected deeply on the lessons from my own career
- I am motivated to increase diversity in management levels in my organization
- I could learn a lot from younger, less experienced people in my organization/ my profession
- I would welcome challenge to my thinking from someone outside my immediate circle
- I like to help people work things out for themselves, rather than tell them what to do
- I can help more junior colleagues by providing them with a broader perspective on our organization/profession
- I recognise the value, both to me and to my organization/profession, of engaging with younger talent; and I see this as a personal responsibility
- I am grateful to have had the privilege of being mentored in my own career.

CHAPTER 4:

Finding a mentor or mentee

Because mentoring is a learning *relationship*, it's important to find the right mentor for your needs, at the right time. The following questions will help you make a good choice.

What do I want a mentor for?

People want mentors for a variety of reasons. The most common are:

- To help them work through a significant role transition – for example, from one level of management or leadership to the next. (See below for a description of the most significant transitions.)
- To develop and pursue a career plan
- To acquire tacit knowledge (e.g. learning about the intuitive judgements needed in a job role)
- To develop wider/deeper networks
- To strengthen specific leadership behaviours
- As an informed sounding board for complex decisions
- To manage your professional reputation
- To understand another area or function of the company, into which you might like to transfer.

A potential mentor will expect you to have thought through what you are looking for in the learning relationship. They will also expect you to have done some initial thinking about how the mentor might help – for example, by pointing you to other useful resources, by explaining how business systems *really* work, or by helping you to learn from mistakes. And they will expect you to be able to explain what you are going to do to make the relationship work.

One mentor or several?

If you have several different purposes for your mentoring, you may want to create a *mentor network*. Typically, a mentor network involves one relatively long-term

mentor, who helps over time with a range of career and self-developmental issues; and a series of relatively short-lived relationships, based on transfer or exchange of specific knowledge, know-how or experience. Some of these may be formal relationships, others informal.

How much challenge am I looking for?

Effective mentors provide a balance of challenge and support. If you just want to tap superficially into their knowledge and experience, then the issue of challenge isn't relevant. But the most effective mentoring works on the quality of your thinking. Your mentor may cause you to question deeply-held beliefs and assumptions, to re-assess your strengths, your weaknesses and your values. The greater the impact you want to have, the more important it is to have a mentor, who will challenge you in this way. The most frequent complaint by both mentors and mentees is that they are not being challenged sufficiently.

How geographically close do we need to be?

Consider how important it is that you and your mentor are able to meet face to face. While face-to-face conversations provide rich communication, they are often more difficult to arrange at mutually convenient times. Occasional face-to-face meetings, interspersed with conversations using teleconferencing, Skype, or telephone or email can be equally effective.

What key characteristics am I looking for in a mentor?

Some key questions are:

- How important is it that they have specific experience or knowledge? (This may be functional, technical or behavioural.)
- Do I need someone, who understands my job role and function, or someone who will provide different experiences and perspectives?
- What will they be role models for?
- Do they already have a reputation for developing other people?
- Are they respected as much and more for the kind of person they are than for the authority and role they hold?
- Will they be able to communicate well with me? (Clash of communication style is a common reason for failure of mentoring relationships.)

- The ability to stretch and challenge your thinking?
- Can they introduce you to the networks that will help your career?
- Can they offer you a different perspective on the issues that concern you?
- A good understanding of career opportunities in the company?
- Is it important to you that they have a similar racial or cultural background, the same gender or sexual preference, or some other common link?
(Remember – same gender/same race matches typically tend to provide more empathy and support, while diverse matches typically provide greater learning and more effective networking.)
- Does it matter whether they are older, younger or the same age as you?

What resources are available to me?

Mentors may be either formal (part of a structured programme) or informal. To access a formal mentor, you will need to obtain the support of your line manager, your HR Business Partner or both. In some cases, there may be an on-line mentor pool, from which you may be able to identify one or more potential mentors, who will fit your particular needs. Ask your HR Business Partner for details of how to access this.

To find an informal mentor, start with the people you know and consider how well they meet your criteria. Then ask people you trust for their opinions.

What are the potential pitfalls?

Among the most common mistakes are:

- Choosing a mentor too close to your own job role. One of the biggest benefits of having a mentor is that they bring different perspectives. Someone from your own department may not be able to offer a sufficiently unbiased viewpoint.
- Choosing a mentor because of their power and influence, or the speed with which they are progressing their own career. Your mentor is not there to be your sponsor. It's more important to choose someone from whom you can learn a great deal.
- Choosing someone because you like and get on with them. If you are too similar, once again you will limit the learning potential of the mentoring relationship.

How should I interview potential mentors?

Although some formal mentoring programmes match mentors and mentees without significant input from either, good practice is to offer some element of choice, on the grounds that this increases commitment of both parties. If you have two or three potential mentors to choose from, you may be able to select one simply from their description, or what you know of them already. However, you will gain more value from the experience, if you have a conversation with each of them.

Having some concerns about these conversations is natural. After all, you are almost certainly going to have to tell someone, who may be more senior than you, that you have selected someone else. But experience shows that, as long as the conversation is well-prepared and open, all the potential mentors will be both understanding and supportive. Indeed, you will most likely end up with one formal mentor and one or more additional, informal mentors, who you may be able to use on a less frequent basis.

It's important to prepare well for these conversations. Think through what you are looking for in a mentor. Consider also what learning you want to acquire and what sort of person you can learn from most effectively. Consider also what might offer them or what might make them interested in working with you. For example, what aspects of you and your experience might they find interesting – for example, in learning about another part of the business? If practical, send each mentor a summary of your thinking and expectations in an email.

At the meeting, don't forget that you are both making a choice here – the mentor has to decide whether they want to work with you, too! Be prepared to discuss:

- Your objectives from mentoring – the changes you want to see in yourself and your circumstances
- Your expectations of how often you would want to meet the mentor and how (face to face, email, telephone etc)
- Why you think mentoring will be the right way for you to learn (in contrast to, say, going on a course)
- What level of commitment each of you is prepared to make to the relationship
- how you will both know that the relationship is achieving positive results.

This is also an opportunity to obtain a perception of their mentoring style. Take note of:

- How directive or non-directive they are
- How challenging they are
- How easily you build rapport together (i.e. is there a relaxed but purposeful sense of learning in your conversation?)

At the end of the meeting, be sure to thank the potential mentor for their time, give a brief summary of what you have learned, and ask for their impressions.

Afterwards, you may wish to use a scorecard to rate each mentor against criteria which are important to you. Some practical considerations are:

- What was the quality of rapport?
- Do you and the potential mentor share similar values?
- Did they make you think?
- Who did most of the talking? (If it was the potential mentor, this might pose a problem later!)
- How open were they?
- How open did you feel you could be?
- How motivated do you feel they are to be a mentor?
- Are they likely to find the time the relationship will need?
- Can you see yourself still finding this relationship positively challenging in six months' time?

You may wish to talk to your boss or colleagues about your choice, if you think they can offer good advice.

Once you have decided, you need to go back to all the potential mentors and explain your decision. Try to do this face to face, if you can – it's much more personal than by email or telephone. Make what you say brief, positive and open. For example, "When I looked at all my criteria, I felt that X best met what I needed right now. But I would appreciate the opportunity to talk with you again, as my needs change..." This honesty and respect will ensure that you retain the respect of all the potential mentors – the one you have chosen and those you have not.

What if you make the wrong choice?

Mentor and mentee are expected to review the relationship after two meetings and then every few meetings thereafter. This gives you an opportunity to seek a rematch if the relationship doesn't work out.

CHAPTER 5:

What mentors and mentees should expect of each other

It is important from the outset that both the mentor and the mentee set out and discuss their expectations in terms of their roles and their respective responsibilities. Mismatched expectations are the most common cause of relationship failure. In contrast, having clear expectations of each other (a formal contract is not necessary and can be viewed as over-bureaucratic) allows mentor and mentee to overcome any problems they encounter in the relationship, by going back to basics. The descriptions below provide a starting point for the discussion about roles, responsibilities and expectations overall.

What's expected of a Mentor?

- *Time.* The mentor should be willing to invest enough time to ensure that the relationship achieves a substantial depth of trust and positive outcome for both the mentee and themselves.
- *Willingness to challenge* – a mentor will, when appropriate, push the mentee to think more deeply, address uncomfortable issues and set higher ambitions for themselves.
- *Willingness to listen and learn* – research suggest that the most successful mentoring relationships are those where the mentor places more emphasis on what they will learn from the relationship, than on their need to be useful to the mentee.
- *Enthusiasm, openness and honesty* – letting go of their ego and sharing thoughts and feelings they might not expose to a wider public
- *Confidentiality and commitment* – what is said between mentor and mentee is confidential, except in very special circumstances that may be defined by the programme organiser or by law
- *Guidance and advice* – but only where it is truly needed and expands the mentee's understanding, so that they can continue to think through an issue and make their own choices.

What's expected of a Mentee?

A mentee should follow the same guidelines as the mentor, with the addition of:

- *Establishing the path they want to follow.* The mentoring relationship's main aim is to help the mentee determine the broad career and personal development paths they want to take, and to follow them through.
- *Showing consideration.* Recognise that a mentor's time and energy are precious and to be used wisely.
- *Driving the relationship.*- Mentees are responsible for driving the relationship, setting the agenda and arranging mentoring meetings; they raise the issues they'd like to work on; and find their own solutions for issues that they may be facing.

CHAPTER 6:

The core roles of a developmental mentor

Early research into what mentors in the sponsorship mentoring model do identified a range of “functions”, which fell into two categories:

- Those aimed at providing psycho-social support (which ranged from giving encouragement to hands-on practical help)
- Those aimed at advancing the careers of the protégé, or helping to make career decisions.

Later researchers added a third category, relating to learning and the acquisition of specific expertise or knowledge.

Those three categories are also valid for developmental mentoring, but here the emphasis is much less on what mentors *do*, than on the kind of conversations and reflective thinking that they stimulate. Developmental mentoring roles tend to lie on a spectrum from challenging to nurturing (two of the key attributes of the Goddess Athena). Developmental mentors may also choose, from time to time, to be more or less directive, though the bias should always be towards approaches that focus more on the mentee’s reflections on experience, rather than those of the mentor

The core roles or functions of a developmental mentor can be described as:

- A safe sounding board and confidant – someone who has no vested interest in an issue, other than the well-being and success of the mentee
- Networker/facilitator – either making introductions or helping the mentee develop larger and more effective networks
- Role model – providing a positive example for the mentee to learn from, but also helping the mentee learn from their mistakes and weaknesses. Role modelling is particularly important in the context of helping the mentee acquire ethicality and authenticity
- Challenger – helping the mentee question their assumptions, beliefs and perspectives

- Opening horizons – enabling the mentee to see possibilities that would otherwise have been hidden from them. Horizons may be external (opportunities in the world around) or internal (raising the mentee’s self-awareness)
- Guide – where appropriate (i.e. after the mentee has exhausted their own thinking on an issue and asks for the mentor’s perspective¹) giving the benefit of their experience. Guiding is particularly useful in the context of, for example, helping the mentee understand the complexities of organizational politics
- Career counsellor – helping the mentee think through career options
- Confidence builder – helping the mentee become more confident in their ability and potential.

1 It’s easy to think that the mentee has come to this point well before they have actually done so. Effective mentors may have a lot of experience to offer, but they are very sparing in handing it out. A useful technique here is “Third time of asking” – the mentor only gives advice when the mentee appears to be stuck and has requested it three times.

CHAPTER 7:

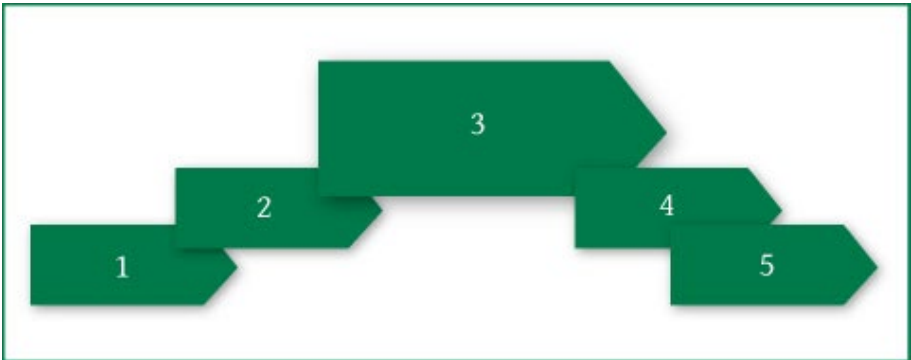
How developmental mentoring relationships evolve

Developmental mentoring relationships tend to pass through a number of overlapping but observable phases:

- Phase 1: Getting started/building rapport
- Phase 2: Clarifying direction and purpose
- Phase 3: Heightened (mutual) learning
- Phase 4: Winding up
- Phase 5: Moving on

In the diagram below, the length of the arrows represents the time each phase typically takes and the depth of the intensity of the learning.

The five phases of the developmental mentoring relationship



Phase 1: Getting started/building rapport

This phase is often critical in determining how well the relationship will work. Here mentor and mentee learn to respect and trust each other, test how open they

can be with each other and develop a common understanding of the ground rules of how they will work together. If they have already had an initial interview, this process will already have started.

Some practical guidelines for this phase include:

- Be as open as you can from the start
- Try to get to know each other at the level of sharing values – things you are genuinely passionate about, what’s important to you in life, what you want to contribute to the world, what gives you joy and what makes you frustrated. (If the conversation is limited to work, families and sport, it’s too shallow to have significant rapport!)
- Talk about your expectations of each other – what will make you feel genuinely listened to and valued, how you will show respect for each other’s opinions and time, how you will be honest with each other
- Commit to as high a level of challenge in the mentoring conversations as you think you can take
- Agree the logistics of the relationship (for example, how often you will meet, whether meetings have to be face to face) – you’ll find more on this in section 10)
- Commit to reviewing both the learning and the relationship, at intervals.

Some practical ways to build rapport

Rapport occurs in mentoring relationships when both people feel that:

- they share common values
- there are no hidden agendas
- they have a shared or congruent purpose
- they can be confident that whatever is said will remain confidential between them
- they are genuinely attentive and interested in what each other has to say
- they have mutual respect and positive regard
- there are minimal distractions

- they trust each other to do what they say they will
- they trust each other's goodwill
- they are able to say what they think without worrying about being criticised or judged
- the relationship is liberating/empowering (as opposed to confining/disempowering).

It can be helpful to discuss how much in rapport with each other you feel, referring to these characteristics, and what each of you can do to build rapport. If rapport seems to falter at a later stage in the relationship, this early conversation will hold you in good stead. Other practical ways to build rapport rapidly include:

- personal disclosure, especially by the mentor, about fears, mistakes they have made and personal opinions they hold, which may not align with official policy. Opening up in this way gives the mentee encouragement to be similarly open. However, it's important not to overdo personal disclosure. It's usually not appropriate to reveal intimate personal information, and mentors who talk too much about themselves, can destroy rapport by giving the impression that the relationship is all about them! Like salt on a meal, putting a little on brings out the flavour of the food, but putting on more smothers it!
- instead of looking for common ground in your job roles, or which sports teams you support, focus instead on the values you have in common.
- alternatively, share in turn the things you feel most passionate about.

The first meeting

The first meeting is an opportunity to get to know each other, establish ground rules for the relationship and begin to explore a shared purpose for the mentoring.

Holding a contracting conversation or even creating a 'contract' is crucial because it helps to define:

- What the relationship aims to achieve
- Expectations: of the relationship/for learning
- Responsibilities: to one another/to others
- Confidentiality

- Boundaries of the relationship
- Meeting logistics
- Note taking
- Commitment to openness and honesty and to giving/receiving feedback
- When and how to measure progress.

Contracts or 'agreed ways of working' also offer a practical basis to refer to if the relationship gets into trouble further down the road.

Do

- Consider where to meet. Choose somewhere you both feel comfortable. For some this may be in a social environment, others may prefer a quiet meeting room or hotel foyer. If you do choose to meet in a restaurant or bar, avoid places that have loud noise, crowds or distractions.
- Allow sufficient time together – allow at least one, and no more than two hours. Too short a session will not allow time to get to know each other and begin to explore expectations.
- Agree the 'contract' and ground rules of working together – discuss together the practicalities of how the relationship will work, what each person will contribute towards the relationship and value in the other.
- Discuss and develop a shared sense of purpose for the mentoring – explore and define what the overall learning objectives and purpose of the relationship might be from both the mentee and the mentor's perspective.
- Share and consider each person's values – ask questions and listen carefully to appreciate what is truly important for each of you.

Don't

- Get drawn into the mentoring conversation without exploring expectations of the relationship
- Make assumptions about who the other person is and what they want.
- Set the mentee 'homework' without checking and mutually agreeing this is what they want.

- Leave without agreeing the date and venue of the next meeting.
- Go overboard in the formality of the contracting – the more bureaucratic the process seems, the less commitment it is likely to attract.

Phase 2: Clarifying direction and purpose

Research tells us that the goals people bring to mentoring tend to evolve as they grow in understanding of themselves and of the possibilities in the world around them. Having a very specific, SMART¹ goal at the beginning isn't associated with either relationship quality or positive outcomes. Indeed, focusing on establishing concrete goals too soon can be harmful, because commitment soon wanes. "Wrong" goals include those that are imposed – often subtly and without the mentee being aware of it – by someone else (for example, living up to the expectations of one's parents); and goals that are not fully congruent with the mentee's personal values.

By contrast, having a *sense of purpose* for the relationship (a much broader framework, upon which to develop goals that are fully authentic) is closely associated with both relationship quality and positive outcomes for the mentee. It is particularly associated with depth of reflection and personal change. The reason for this appears to be that mentor and mentee are both clear about why they are meeting and at the same time creating space for stretching and engaging goals to emerge as dialogue and reflection deepen the mentee's understanding of themselves and their context.

Career development

Purposes:

I want some clarity (or greater flexibility) about the career paths open to me

I want to build a strong track record.

Specific goals:

I want to be promoted within the next six months

I need to achieve this professional qualification.

Learning

Purposes:

I want to develop my abilities as a leader

I want to excel in my field

I want to understand more clearly what motivates me and others.

Specific goals:

¹ SMART has various interpretations, but the most common is Specific, Measurable, Agreed, Realistic and Timely.

I want to change this behaviour
 I want to run more effective appraisals
 I need to develop better presentation skills.

Enabling

Purposes:

I want to create and implement a robust and challenging personal development plan
 I need to manage my reputation better
 I need to extend and improve my networks.

Specific goals:

I want to find a champion in that department, who will help me transfer to that area of the business
 I need to influence/build bridges with this particular person or persons.

Emotional

Purposes:

I want to become more self-confident
 I need to feel more in control of my life and work.

Specific goals:

I need to get over being turned down for promotion
 I want to feel less guilty about coming back to work, when my child is so young.

Having a broad sense of purpose doesn't mean that mentoring conversations have to be vague – on the contrary, they provide the longer-term perspective into which discussion around specific, more immediate, subsidiary goals can be placed. The table above illustrates the range of goals that might be addressed in mentoring.

What to do if it's not working

Having a “no-fault separation clause” is an essential part of the mentoring process. In a small proportion of mentoring relationships, it becomes clear early on either that the chemistry is not there, or that the mentor does not have the skills, experience, background or interests that the mentee had expected.

In the instance where either one or both of you feel it may not be working:

- Review your original expectations
- Consider how much have you veered away from your ground rules

- Establish a clear agenda to discuss the situation
- Give feedback to each other – with examples
- If there is no improvement – talk to your programme manager.

Phase 3: Heightened (mutual) learning

This is the core period of the mentoring relationship. Mentor and mentee have come to know and respect each other, there is a clear sense of purpose for the relationships, against which day-to-day issues can be contextualised, and the mentoring conversations are characterised by openness, depth of reflection and mutual learning.

The mentoring conversation



- Establish a relaxed, professional learning environment
- Understand the context and as much as possible of what is known and not known
- Summary by mentor
- Build self-belief in the mentee
- Help the mentee find solutions congruent with their values
- Summary by mentee

The process described in the diagram is based on observation of hundreds of mentoring conversations in relationships that have reached this mature stage. Effective mentors:

- Start by making sure that both they and the mentee are in the right frame of mind for a creative, open conversation. Often this is simply a matter of some initial small talk to create a relaxed atmosphere, but some pairs use more formal approaches, such as a couple of minutes meditation.
- Help the mentee articulate and explain the issues for discussion. This usually means holding back on talking about their own experience and also recognising that the presented issue may not be the real issue. By spending time delving into the context, understanding the situation from multiple perspectives, questioning assumptions and looking for hidden patterns, the

mentor and mentee develop a deeper mutual understanding of the issues and ensure that any solutions generated will be soundly based and congruent with the mentee's values and feelings.

- Summarise when it seems that a sufficient understanding of the issue has been reached. This gives the mentee an opportunity to speak up, if they think the mentor has misunderstood.
- Reinforce the mentee's self-confidence and self-belief, before moving into solution mode.
- Help the mentee to explore a range of possible solutions or ways forward and to test each against their personal values and long-term ambitions.
- Encourage the mentee to summarise the mentoring conversation overall. This is important, because it emphasises that responsibility lies with the mentee, rather than with the mentor.

Phases 4 & 5: Winding up and moving on

Most formal structured mentoring programmes will have a defined end or suggested timeframe. To ensure the winding up and moving on from any mentoring relationship is well-managed, it is important to consider how to plan and manage closure, look back at what has been learnt and also look to the future. Research shows that mentoring relationships which drift away are most often looked back upon negatively by both mentor and mentee, whereas those that have a clear ending, with acknowledgement of each other's contributions, are in hindsight almost always seen positively.

Do

- Prepare for the transition ahead of time
- Frequently review the relationship
- Emphasise the mutual learning
- Be open about your feelings
- Celebrate the successes
- Help mentees plan how to manage on their own (mentors)
- Encourage the mentee to become a mentor (mentor)

- Agree how/when you will keep in touch.

Don't

- Allow things to drift away or fizzle out
- Make the break abrupt
- Feel guilty about taking your independence (mentees)
- Try to keep the relationship going beyond its “sell-by date”!

CHAPTER 8:

The core skills of being an effective mentor and/or mentee

Because the mentoring conversation is a collaborative endeavour, it requires a number of skills from both mentor and mentee. Typically, the mentor, as the more experienced and more mature partner in the relationship is expected to demonstrate a greater level of skill than the mentee, but this isn't always the case. Indeed, some mentoring programmes have, as part of their agenda, helping senior executives practise in a safe environment the skills of listening (as opposed to talking) and asking powerful questions. In the spirit of mutual learning, the mentee might from time to time be called upon to guide their mentor – for example, a white Anglo-Saxon mentor might ask a Muslim mentee how to understand the motivations of one of his direct reports, who is from a similar cultural and religious background. So mentees need at least some understanding of all of the skills explored in this section.

Listening

The quality of listening in the workplace is generally poor, so mentors and mentees often have to work hard to listen intensely to each other. Current research suggests that listening in a learning relationship has five modes:

1. Listening to argue or refute
2. Listening to respond with your own thoughts, or to ask a question
3. Listening to understand
4. Listening to help someone else understand
5. Listening without intent (i.e. listening intuitively, with all your senses and without any specific focus of attention).

Most of the time, people at work function only in the first three (or commonly only in the first two) of these modes. But effective mentoring requires the mentor in particular to have a much wider range of listening modes. Mode one, listening to argue, is not conducive to a learning conversation. Mode two can be a dangerous distraction – the more attention you pay to thinking up the next

question, the less attentive you are to what is being said. (A useful exercise here is to try *not* to focus on finding the next question. While this may result in a period of silence, when the mentee finishes speaking, they almost always start again without a prompting question from the mentor. And really good questions have a habit of appearing spontaneously, without great effort!)

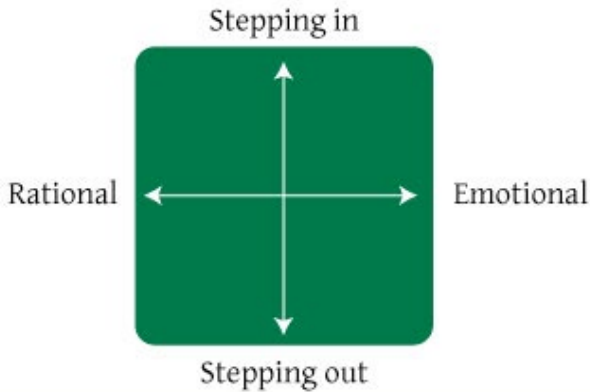
The more mentor and mentee can concentrate their attention on modes three, four and five, the stronger will be the quality of their rapport and their reflection.

Questioning

It is fairly obvious that mentors will be at their most effective when they use open questions (ones that don't elicit a yes/no answer). Open questions create space for the mentee to think around an issue and explore it from different perspectives. It's equally useful for the mentee to adopt the same approach. Rather than saying, "Do you think this is a good idea?" they can stimulate a reply of greater depth by asking, "What do you think I should be taking into consideration in evaluating this idea?"

Recent experiments into the nature of effective use of questioning in mentoring have looked at how mentors help the mentee shift perspective and how they craft powerful questions. Shifting perspective is important, because seeing a problem in the way you have always seen it leads to the same (often unhelpful) solutions and behaviours. In the diagram below, *Stepping in* is about helping the mentee explore an issue from their own perspective, either emotionally or rationally; *Stepping out* is about helping them see it from another person's perspective.

Stepping in and stepping out



So, if someone enters the conversation from a stepping in/emotional perspective (perhaps they have had an argument with a senior colleague and lost their temper), the mentor can explore how they feel – if only to give them a chance to let off steam. They may well feel a mixture of embarrassment, fear for the consequences, perhaps a little ashamed at losing control, and so on.

Staying in this perspective isn't going to solve anything, though. So the mentor has two choices. He or she can attempt to move the conversation into the stepping in/rational perspective (For example – “What’s the potential impact of this event?” “What’s the best outcome you could hope for from this?”) Or they can try to stay in the emotional perspective, but shift it into stepping out. (For example, “How do you think the other person is feeling right now?) From either of these perspectives they can move into the rational/stepping out perspective. (For example, “What could you do practically that would mend fences with this person/reduce the impact?”)

The mentoring conversation can start in any of the quadrants and move clockwise or counter-clockwise between them until the mentee sees the issue sufficiently differently to develop solutions they feel comfortable with. Typically, the mentor would not ask more than four or five questions in one quadrant before making a shift of perspective.

Most of the questions asked in the mentoring conversation simply keep the flow of dialogue moving in a progressive way. But effective mentors intuitively inject the occasional really powerful question – one that really makes the stop and

examine their assumptions. Both mentor and mentee can benefit from collecting and occasionally reviewing powerful questions. Mentors can also build their repertoire by testing the questions they ask against the acronym PRAIRIE, which stands for:

- Personal – the mentee can immediately see the relevance to themselves and their situation
- Resonant – there is both emotional and intellectual impact
- Acute/Incisive – the question gets right to the point
- Reverberant – they keep thinking about it long after the initial conversation
- Innocent – it is solely about the mentee's agenda, not the mentor's
- Explicit – it is very simply expressed.

Summarising

Summarising is one of the key learning processes of learning conversation strategies that a mentor needs to develop. It is a crucial part of any mentoring conversation, for several reasons.

It provides an opportunity to:

- Step back from the dialogue and review how it has evolved
- Capture key points and ideas so as to minimise note taking during the flow of conversation (taking occasional interludes for summarising and note-making are valuable)
- Check each person's understanding of the issue so far
- Establish boundaries between different stages of the conversation
- Identify what has *not* been said
- Reassure the learner that you have been paying attention
- Consider how the learning process could best be pursued in the next phase of the conversation
- Regroup when the conversation doesn't seem to be going anywhere.

The point of summarising is not just to condense what has been said. It is just as important as a process for examining the issue in a different, more structured way than in the normal flow of conversation.

When to summarise during mentoring conversations

Within a mentoring conversation, there are always at least two places where it is essential to summarise.

The first is once the mentee's issue has been explored and the mentor feels it is time to move the focus of the mentee to solution mode. A vital part of moving on in any conversation is checking mutual understanding. Progressing dialogue without doing so carries a number of risks, for example dealing with only the presented issue or steering the mentee towards an inappropriate solution. At this point, it is important for the mentor to take the lead in summarising, to ensure that all the information is available that can be available, and that it is structured in a way that is meaningful to both parties in a similar way.

The second essential time to summarise is once a solution or course of action has been identified for the mentee. At this point, it is important that the mentee takes responsibility for summarising. If the mentor does it, they “take the monkey back onto their shoulders” i.e. they risk taking responsibility for the solution and its implementation, which in turn may reduce the learner's commitment.

In practice, an effective mentor will summarise or encourage the learner to summarise whenever they see an opportunity to reinforce learning and check understanding.

Other useful points at which to summarise include:

- At the beginning of the session, when the mentee first explains what they want to achieve from the conversation
- Whenever the conversation has been going for more than around 15 minutes and there is a suitable pause in dialogue
- When the mentee is having difficulty articulating their thoughts or reconciling conflicting ideas
- When the mentor feels confused about the issue or what the mentee is trying to say
- When the mentee appears to be contradicting themselves, but is not conscious of doing so

- When there is a need to clarify options and the pluses and minuses of each of them.

How to summarise

Practical guidelines for summarising include:

1. Choose the moment carefully – don't interrupt when the other person is in deep thought
2. Be clear about why you are summarising at this point (e.g. "I think it would be helpful if we paused to check our understanding so far.")
3. Make summarising a *mutual* process. It is important to feel that summarising is a process that takes place *with*, and not *for* an individual.
4. Take notes, if necessary, but put more emphasis on visual means, such as diagrams or flow charts, because it is easier to use these to structure the next part of the conversation and to make sure elements don't get missed out.
5. Summarise at more than one level. For example:
 - a. For content (what was actually said – and *not* said)
 - b. For emotion (what the learner feels and the values they are applying)
 - c. For intent (are we still clear about what we want to achieve?)
6. Beware of "summarising into submission". Give the learner frequent opportunities to amend or reject a summary (giving someone sufficient time to think about what you are saying is an important part of this); let them take control of the summarising process whenever they feel able.
7. Use the summary at one point as the starting point for summarising at the next, e.g. "When we summarised a while ago, we concluded... Have we changed our thinking about that?"

Useful questions and statements to include when summarising:

- Would it be helpful at this point to summarise what we do and don't know about this issue?
- What have we learned so far?
- Let me run through what I think I'm hearing
- What do you think we have agreed?

- So what you are saying is...
- Let's list the choices you have.

Challenging

Mentor and mentee need to be relaxed about challenging each other's assumptions, stereotypes and opinions. Indeed, the quality of constructive challenge is one of the core characteristics of mentoring relationships with high levels of co-learning. Lack of challenge is also one of the most common complaints from mentors and mentees, when they feel the relationship is not delivering what it should. It's convenient to look at challenge from two perspectives – giving it and receiving it.

Giving challenge

Nobody likes having their ideas and opinions criticized, but challenging our thinking is how we learn.

Challenging other people can be confrontational, but then they are unlikely to really listen and may respond by defending, rather than thinking about what has been said. Challenging is much more effective when it is done in a learning manner. Here are some useful guidelines and phrases, which can be adapted to make challenge easier and more acceptable in most cultures, even in those where there is a high level of concern not to lose face or cause another person to lose face.

- When challenging logic: *Help me to understand...* This makes the other person work through their logic, often leading them to see gaps they had not noticed.
- When challenging behaviour: *Can you please explain to me what you were intending to achieve there?* This takes away the sense of being judgemental.
- When challenging assumptions: *What factors were you taking into account here? What assumptions were you making?* This prevents the other person feeling that we are questioning their intellect.
- When challenging perceptions: *Can you explain to me the context in which you were looking at this?* – so we don't appear to be questioning their judgement.
- When questioning values: *What are the personal/organizational values you are trying to apply here? What's important to you in this situation?*

An alternative way of challenging is to reflect back your own feelings. For example:

- *I'm feeling confused at this point...*
- *I don't feel very comfortable with that statement...*
- *My instinct tells me that this is not right...*

In each case, you are taking the focus (and hence any hint of criticism or fault) back towards yourself, so it is easier for the other person to respond generously.

Receiving challenge

The key to receiving challenge is to be aware of and to check our instinctive reactions of affront and resentment. Acknowledge these and consciously put them aside. Ask the other person *Would you mind repeating that? I want to understand it properly.* This gives you the time and space to hear them accurately and for them to rephrase it in a less confrontational way, if they wish to.

Now think about what has been said from the perspective of:

- Was it said with goodwill? (Anything a mentor says is likely to have your best interests at heart.)
- What is it that makes me respond defensively? (We all have messages we avoid hearing!)
- Is there a difference between my intent and the impact I am having?
- Am I willing to explore my logic, my assumptions, my perceptions, my values etc?
- What learning can I immediately take from this feedback?
- Which aspects of this feedback am I ready to take on board and use to make changes?

In the first mentoring conversations, where mentor and mentee establish expectations of each other, it's helpful to agree something along these lines:

- I will always give you honest feedback about what I observe and hear in our conversations
- I will question whenever I feel that a statement, opinion or assumption is not fully thought through

- I will challenge whenever I perceive a divergence of values
- I will welcome and give open consideration to constructive challenge
- I will always seek to challenge with respect (i.e. in a way that does not undermine your self-esteem).

Role modelling

Consciously and unconsciously, we learn from observing and listening to other people. Sometimes we learn not to be like them, but mostly we tend to absorb their ways of thinking and their behaviours. This happens whenever someone joins an established group or team, and in learning relationships, such as in coaching and mentoring. The greater the disparity in authority or in experience between the two people, the more role modelling is likely to occur. Role modelling is very powerful, because it is an instinctive form of learning. The mirror neurons that lie at the heart of the process are core to our ability to socialise, to understand other people, and to work in groups.

Role modelling usually happens at a subconscious level – it is a largely passive process. In the workplace, however, making role modelling a considered, proactive process is important, because:

- It helps people absorb behaviours that are positive and beneficial, while rejecting those that aren't
- It strengthens good behaviour (when someone sees their behaviours being emulated by another person, it stimulates their mirror neurons, too!)
- It helps people think about how they adapt other people's perspectives and behaviours to fit their circumstances and their personality – so they use what they learn in a more authentic way
- It helps align individual behaviours and thinking patterns with corporate values.

In any kind of leadership role, whether as manager, coach or mentor, you can be a more proactive role model by:

- Gaining a clear understanding of your own strengths and weaknesses – what someone else can usefully copy from you and what they shouldn't!

- Recognising when your strengths become weaknesses from being over-used or used in the wrong places and being humble enough to share this with people you may influence
- Helping people who may use you as a role model to understand the context and impact of using behaviours they might copy from you (for example, learning to be more assertive can be beneficial, but the behaviour needs to be modified in some situations to avoid being seen as aggressive.)
- Having conversations with people about how they can be selective and use judgement in what they use you as a role model for.

If you are looking to develop a behaviour or set of behaviours, you also need to be proactive in using a role model. Finding someone who is naturally very, very good at the behaviour or task is one option. However, that can be a bit like a beginner tennis player role modelling Roger Federer – to learn from an expert, it helps to start with reasonably proficiency. In almost every field of endeavour, the basic skills you acquire in the early stages of learning are dropped as you become more capable and more confident (rather like taking off the stabilisers on a child's bicycle). Choosing as a role model someone who is now reasonably good, but who has had to develop *coping strategies* to achieve their level of performance, brings the learning gap down to more manageable proportions. They are also more likely to be able to empathise with your struggles.

Whoever you use as a role model, you can be most effective in extracting lessons from them, if you get them to talk about what they do. Ideally, you want to understand both their conscious competence and their unconscious competence (what they do well without thinking about it). Some useful questions here are:

- When you set out to do this, what are the key things you are mindful of?
- What goes through your mind as you prepare to do this? As you do it? Immediately after you do it?
- What is different between the times you do this really well and less well?
- When are the best and worst times to behave/think like this?
- How differently would you use this strength, if you were in my shoes?

You can also manage your own learning processes. People typically go through a five-stage process of using someone else as a role model:

1. *Acceptive awareness*: Identifying, sometimes from a distance, someone who appears to have qualities you would like to have
2. *Admiration*: Getting to know this person better and comparing yourself to them; wanting to be like them
3. *Adaptation*: Consciously or unconsciously adopting their perspectives, values and behaviours
4. *Advancement*: Exerting your critical faculties to integrate their mental models with your own, rather than accepting them wholesale
5. *Astute awareness*: Seeing the role model as a whole person, with frailties as well as strengths; becoming clear about what to accept from the role model and what to reject.

It's common for children and young teenagers to move rapidly through a succession of role models, unconsciously repeating this cycle. As adults, we have greater capacity to exercise judgment all through this cycle, bringing ourselves to astute awareness much more quickly. Having open conversations about role modelling reinforces this.

Guiding/giving advice

Advising a mentee on what to do or how to approach an issue has a number of benefits. It focuses their mind on what is important (at least from the mentor's perspective). It is a lot quicker than helping them work it out for themselves. And it allows the mentee to tap into the mentor's experience with relatively high efficiency.

However, advising also has a number of significant disadvantages. When people work through an issue to develop their own solutions, they:

- Tend to be more committed to following them through
- Are more likely to sort similar issues out for themselves
- Take greater personal responsibility for the outcomes.

Keeping in mind the analogy of teaching someone to fish, rather than giving them a fish, mentoring has greatest impact when advising is kept to a minimum.

Guiding is a middle path, which the less experienced mentor can use safely in some circumstances. Guiding involves:

- Using your own experience and knowledge to ask questions, which help the mentee follow a similar path of reasoning to your own
- Only suggesting solutions with the mentee's permission – asking them first if that is what they need.

The danger with guiding, however, is that a solution that works for one particular mentor may not work for someone else. A critical question to keep in mind, therefore, is *How relevant is my experience and opinion in this situation?* If in any doubt, fall back to a non-directive, questioning style.

When to advise and when not to advise

The decision on when to advise, guide or ask good questions depends on three factors:

1. What is the situation?

There are times when immediate, directive advice giving is important. For example, if someone is about to make a serious or hazardous mistake, the mentor has a duty to warn them of outcomes they may not have foreseen. However, the conscientious mentor will always look for an early subsequent opportunity to revisit the issue, to review it and help the learner draw out lasting lessons from it.

Sponsorship mentoring relies on advising and guiding; developmental mentoring makes very little use of these. Developmental mentors ensure that both they and the mentee fully understand the situation in its context, before they even consider advising or guiding. In most cases, through the process of dialogue and reflective space, the solutions become obvious to the mentee without the need for advice. If they are still struggling, the mentor may eventually help by guiding, and, if necessary, by advising – but this is the last resort not the first!

An important guideline here is: *Don't expect the mentee always to find their solution within the expected timeframe of the mentor or within the timeframe of the mentoring session. As long as they have a better understanding of the problem, encourage them to reflect on it for a period (a few hours, days or even weeks); then to pick it up again once their own subconscious has had time to work on it.*

2. How can the mentor help?

Useful questions here are:

- *How will giving advice or guiding help the mentee now? And when they encounter similar situations in the future?*

- *What is my possible range of helpful responses in this situation?* (Responses include advising, guiding, questioning, simply listening, challenging and so on.)
- *What is my motive for advising or guiding?* Is it to make myself look good, or to relieve the internal pressure of having good ideas and wanting to express them?
- *If I were the mentee, what kind of response would I most value at this point?*

As a mentor it is important to practice pausing before responding to the mentee, for long enough to consider at least some of these questions. This slows down the pace of the dialogue (which will encourage the mentee to reflect) and helps the mentor to be more confident in responding appropriately to the mentee's needs.

3. Where does the ownership need to be?

The more the ownership of an issue needs to rest with the mentee, the more important it is that they develop and implement their own advice.

Conditions for giving advice

This useful checklist comes from Jenny Rogers' *Coaching Skills* handbook.

- There are clear right/wrong answers to a question the learner is asking – e.g. on the legal, medical or financial position.
- It is a crisis and needs rapid action.
- The learner's physical, financial or mental well-being will be in danger without having the piece of advice.
- The learner is not in a position to make their own decisions.
- You are offering facts, not opinions.
- The learner has specifically asked for information and has made it clear that they will make up their own mind on how to use it.
- You offer your contribution as information, making it clear that the learner has to make up their mind about using it to make a decision and positively inviting the learner to comment: "These are the facts as I see them, but what do you think?"
- You encourage the learner to check it out with other experts.

- The subject is genuinely bewildering and the learner needs expert guidance to be able to understand it. You have unquestionable expertise, rather than just another personal opinion, in the area on which the learner is seeking advice.
- Giving the advice is unlikely to create dependency, to humiliate or to encourage unwise optimism.
- Your own motivation does not include any of the following:
 - a wish to impress and show off
 - wanting to control
 - being too lazy to use coaching techniques
 - feeling a need to pay the learner back for some slight.

Groundrules for giving advice

- Start with the assumption that the mentee needs to listen to their inner voice of advice first
- Ask permission to advise, if they clearly do need the benefit of your experience and judgement
- Consider *why* you want to advise. Is your intention to help the mentee find a solution or because you believe you know the answer?
- Be precise about what you are advising. Differentiate between the specific (e.g. “I wouldn’t put that into the public domain”) and the broad (e.g. “There can be real dangers in...”)
- Listen to yourself as you give advice
- Keep it short and to the point
- Make it clear that your advice is offered as a means of initiating a deeper dialogue, rather than as a means of closing down the conversation
- Having given advice, spend time helping the mentee think how they will adapt and merge it with their own experience and judgement.

Structuring advice

- Explain *why* you are advising

- Explain the *source* of your advice (e.g. personal experience, personal observation, instinctive reaction, third party data, research)
- Succinctly give the advice
- Check it has been understood in the way you intended
- Check that the mentee is finding the advice relevant and useful
- Review with the mentee how they will assimilate the advice in their own way; encourage them to do so.

CHAPTER 9:

Managing the logistics

Getting the logistics right is important in making the developmental mentoring relationship run smoothly and deliver value. It is particularly important to give thought to:

How often should we meet?

It's typical for mentor and mentee to meet more frequently at the beginning, when both are trying to understand the mentee's aspirations and issues, and less frequently later on, when meetings tend to be more about maintaining the mentee's momentum on the path they have chosen. However, almost any pattern of frequency can occur, depending on circumstances. Some programmes recommend a regular pattern of monthly or six-weekly meetings; others leave it to mentor and mentee to work out for themselves. Some practical guidelines are:

- If you meet less than once every three months, you do not have a real relationship; if more than once every couple of weeks, the mentor is doing the job of the mentee's line manager.
- Review the frequency every few meetings to make sure it is satisfactory for both of you
- Be prepared to mix some full, face-to-face or Skype sessions with shorter telephone calls or e-mail mentoring exchanges – this flexibility will allow for more just-in-time mentoring
- Put several meetings in the diary so that, if you have to postpone one, you do not lose the rhythm of the mentoring conversations. (If you arrange them one at a time, you may end up meeting only half or two-thirds as frequently as intended.)

How long should a mentoring session last?

Again, there are no hard and fast rules, but a practical guideline is that anything less than an hour is unlikely to get into sufficient depth, while anything longer than 90 minutes exceeds people's ability to concentrate. A good practical tip is to allow for an extra 30 minutes in the diary, at the intended end of the session. If it's needed, then neither mentor nor mentee has to rush away, leaving an important discussion in the air. If it's not needed, it provides valuable space for reflection.

Where should we meet?

The simple answer is “somewhere where you can both feel relaxed, calm and able to have a creative conversation”. Some places to avoid are:

- Noisy, public environments
- Anywhere that emphasises power (for example, the mentor’s office, if they are much more senior than the mentee) or might make the mentee feel self-conscious (for example, their office).
- Anywhere where other people can peer in and watch what you are doing
- Anywhere that might stimulate gossip (in cross-gender mentoring relationships particularly, it’s best to avoid the quiet little country rendezvous!)

Meeting in a restaurant can be OK for a getting to know each other conversation, but there are far too many interruptions and distractions for a learning conversation. In the end, however, whatever works for both of you will be good. But do remember to turn off mobile phones and anything else that might interfere with your concentration.

Travel time provides an opportunity for reflection before and after the mentoring meeting. But only if the travel is free from major hassle. Arriving late, with high adrenalin levels will make it much harder to get into an appropriate state of mind.

How should we prepare?

It’s important for both mentor and mentee to spend time before the session, thinking about how to make best use of the time. (See also Chapter 10) Ideally the mentee should send, by email a day or two ahead of the meeting, an agenda of what they would like to explore. This helps them structure their own thinking and gives the mentor time to reflect on their relevance of their own experience and knowledge, or on the kind of questions that would be most helpful.

How will we capture what we discussed?

It’s very tempting to take masses of notes, but neuroscience is now telling us that we do so at the expense of the quality of our listening. It is now recommended good practice to take very few, very brief notes (for example, key words) and to use natural breaks in the conversation to review what has been said. A useful question here for the mentor is; “What would you like to capture from what we have just been saying?” This also has the benefit of helping the mentor understand what has been most important or impactful for the mentee.

At the end of the session, you can use the four “I’s” to summarise the conversation. These are:

- Issues (what did we discuss?)
- Ideas (what creative thinking occurred?)
- Insights (what shifted in how you see the issue?)
- Intentions (what are you going to do differently as a result?)

How should we handle postponements?

As discussed above, having a series of sessions in the diary can reduce the impact of postponements, but they are going to happen sometimes. As a ground rule, you should always try to give as much notice as possible and to make sure that anyone, who has permission to your put appointments in your diary, understands that mentoring sessions are not to be moved except for genuine emergencies. If you do have to postpone, consider replacing a face-to-face or telephone meeting with an email exchange, to maintain momentum and demonstrate commitment.

CHAPTER 10:

Preparing for a mentoring meeting

It is good practice to spend at least 30 minutes and preferably more preparing for every mentoring meeting. Time spent thinking through what you want from the meeting and how you can achieve that ensures you will get the most from that meeting. By also advising your mentor in advance of your ideas, you allow them to have time to reflect and prepare to support you. When diaries are busy and time is precious, this preparation also gives you both the opportunity to reflect in advance of being together and avoid wasting the first 20 minutes establishing what the issue is.

Some good preparatory questions to reflect on in advance of meeting are:

Mentees

- What issues remain from our last meeting?
- What do I want to achieve in this session?
- What sort of help from my mentor will support this? (i.e. listening, challenging, exploring networks etc)
- How can I help my mentor understand my issue, are there any documents, stories, examples of situations that will help clarify this?
- What has been particularly challenging for me in the last week/month?

Mentors

- What issues remain from our last meeting?
- How have I helped already?
- Review any agenda that your mentee has provided and reflect on –
 - What sort of help does the mentee need?
 - How can I best provide this help?
 - What experiences do I have that would aid the discussion?
 - Who else do I know that could help?

Although any agenda belongs to the mentee, it is good to share this in advance with your mentor as this allows them to know what is important to you at this point and they can start doing some thinking around how they might support you with that.

It can be also be useful to maintain a regular log of events or activities that have gone very well and those that have not gone so well. It can help to record, say once a week, key positive and negative events and reflect on:

- What happened
- When
- Who was involved
- What your role was
- What your intent was
- What their intent was
- What factors you think contributed most to the way it turned out.

This process of reflection typically reveals a range of issues, which you may not have recognised before, and which are worth bringing to mentoring.

CHAPTER 11:

How do you know it's working?

Taking stock of the relationship

It is good practice to review your mentoring relationship at regular intervals. This will ensure you keep a check on how the relationship itself is working and on what progress is being made on achieving the objectives you set at the outset (and how those objectives may have changed).

Ideally, a first review would take place after the second or third meeting with a focus on how the relationship is working. This is a good checkpoint as it allows a discussion to open out if either of you feel things aren't working.

Some questions you might ask at this point are:

1. Are we meeting sufficiently frequently?
2. Are these meetings long enough?
3. Are we both adhering to the original commitments we made to each other?
4. Have we built enough rapport?
5. What do we need to change to make our time together more effective?
6. Do we both have confidence that we will achieve our goals?

It is good practice to revisit these questions as often as you both feel is appropriate – but every 3-4 meetings is a good guide.

As you progress in the relationship, you may also like to add in further questions with some more related to reviewing your goals and others that focus on the quality of your conversations.

1. Do we feel we're making real progress in the relationship?
2. Where have the mentoring sessions helped so far?
3. Are we preparing adequately for meetings?
4. Are we reflecting sufficiently after meetings?
5. What are our thoughts in terms of this relationship around:

- a. Trust and rapport
- b. Challenge of each other
- c. Depths of our discussions
- d. Management of boundaries
- e. Openness and honesty

When reviewing the mentoring conversation, you can also usefully reflect upon and discuss:

1. What percentage of the talking did both of you do? Ideally the mentor does 20%, the mentee 80%
2. Who asked the questions? Good practice is that the mentor should be asking most of the questions.
3. Who found the solutions? This should be the mentee with support from the mentor.
4. Where was the power? Ideally, there should be no power felt, but that you are on equal terms
5. What should either of us do more of/less of?
6. What do we need to change to make this more effective?

What goes wrong and how to avoid it

The review process is there in part to provide a safety valve for the relationship. The effective mentoring relationship is dynamic and subject to all the frailties of human nature, so it's remarkable how few fail to deliver in programmes that are well-designed and well-supported.

The most common reasons relationships run into trouble are shown below.

What goes wrong

Mismatch of expectations

How to avoid/remedy it

Clarifying expectations is an important part of the first phase of the relationship, so it's important for mentor and mentee to be honest with themselves and each other. That usually overcomes any initial problems relating to mismatch of expectations, because it provides an opportunity to dissolve the relationship and seek a re-match.

In other cases, the problem relates to a gradual shift in the mentee's understanding of what they want from the relationship. For example, they may realise that they need someone with a specific experience that the mentor doesn't have. It's easy to think of this as a failure, but actually it's a sign of success and mentor and mentee can work together to specify how the mentee can find a mentor that will meet their expectations.

What goes wrong

Personality clash

How to avoid/remedy it

Various studies of mentoring pairs conclude that it's hard, if not impossible, to predict accurately who will work best together as mentor and mentee. It seems that the instinctive and intuitive pairings made by programme managers, who know their mentors and mentees, is more reliable than any "scientific" method, such as matching on personality profiles.

So it's surprising how few mentoring relationships in well-managed programmes grind to a halt as a result of a personality clash – typically well under 10%. Part of this is because the relationship starts with goodwill on both sides; partly because the process of learning together brings people closer; and partly because power issues do not distort the openness of the mentoring conversation.

If friction does occur and appears to be in whole or part the result of personality differences, mentor and mentee should follow these guidelines:

- Admit to each other that there is some tension in the relationship
- Reconfirm the initial contract, in respect of being honest with each other
- Reframe the conflict as an opportunity for learning – as a safe place to examine stereotypes, reactions to certain behaviours and so on
- If necessary, ask the programme manager, a coach or an HR professional to facilitate this conversation

What goes wrong

Lack of commitment (by either mentor or mentee, or both)

How to avoid/remedy it

It's important to clarify at the start of the relationship, how much commitment each of you has to it.

A common issue is that the mentee may have another mentoring relationship, which they place greater store by. In an in-company mentoring programme, where being mentored is an expected part of a “high potentials” programme, the mentee may feel obliged to take part, even though they already have another mentor outside the organization. In this circumstance, it’s best that mentor and mentee are honest about the situation and discuss whether it would be better (and more honest) not to continue.

Also common is the perception by the mentor that the mentee isn’t committed, because there is no obvious change happening. However, there may be other causes (for example, the mentee may need longer to reflect upon and come to a decision about what they want to do). There is more information on this in the FAQs at the end of this resource.

What goes wrong

Pressure of time/work

How to avoid/remedy it

When people are too busy to take time out to think, the problem has a tendency to get worse, not better. Creating space for thinking enables us to set priorities, to make conscious decisions about what tasks we are not going to do, and to establish control over our time.

If the mentee truly is too busy (that is, if being busy isn’t an excuse for not wanting to meet), then the mentor can offer to help them think through how they can create more thinking space for themselves. This mentoring session can be a relatively short one, focused solely on the issue of gaining greater control over work.

It may also be helpful to revisit the initial contracting conversation and the commitments made then; and to review with the mentee what their real priorities are. How can they give greater priority to things that are important, over things that are urgent? Who do they need to negotiate with, and how, to take back control?

If the mentor is too busy to meet, the mentee may lack the confidence or skill to initiate a similar conversation. However, they can register their concern by reaffirming how useful the mentoring conversations have been to date and asking the mentor “What can we do to keep it on track?”. The more a mentor feels that their efforts are appreciated, the higher the priority they will place on the mentoring meetings.

What goes wrong

Mentor’s lack of confidence in their ability to be a mentor

How to avoid/remedy it

Developmental mentoring requires a different set of behaviours compared to being a line manager; it is both emotionally and intellectually more demanding.

It's quite common for them to feel they are not really up to the task. As a result, they are less proactive in the relationship and more likely to maintain conversations at a relatively shallow level. The solution is quite simple: take advantage of the opportunities available for you for top-up training and for peer support from other mentors.

CHAPTER 12:

Managing boundary issues

While there is a good deal of overlap between being a mentor and being a coach, a counsellor and other helping roles, there are relatively clear boundaries it's important not to cross. Being aware of these boundaries is important in ensuring that the mentor is working within the limits of their own competencies (for example, not trying to be an amateur psychologist), to keep the focus of the relationship on the four types of goal discussed earlier (career, learning, enabling and emotional), and to avoid situations that might inadvertently cause distress to the mentee.

The most significant boundaries lie between:

- *Mentoring and professional counselling or psychotherapy.* If the mentee appears to be suffering from depression, or a repeated cycle of self-destructive behaviour, for example, it is important for the mentor to follow the five step process below:
 1. Note the emotions you observe and allow the mentee to talk about them to the extent they wish to. Confine your comments to acknowledging their feelings and situation, demonstrate empathy as appropriate, but don't attempt to dig below the surface. Simply having someone to listen to them can be remarkably effective in helping them cope.
 2. Make it clear that you may have reached a boundary of where you are competent to help. Ask if they would like to address this issue with someone who is better trained to help them. If they say yes, agree how you will refer them on. If they say no, give them a space to be silent and reflect, then ask if they would like to continue the conversation, focusing on some of the more practical elements of the issue, or would prefer to end the mentoring session at this point.
 3. Make sure they are safe when they leave you. For example, do they have someone else to call upon for support, if they need it?
 4. Having made the introduction to a professional therapist or counsellor (or gone through an intermediary such as the programme manager or Human Resources function), seek professional guidance for yourself. A qualified coaching/mentoring supervisor is an ideal resource here (if all else fails, the

professional bodies in coaching will be able to make recommendations of supervisors). This guidance will help you:

- Reflect on and learn from how you managed the issue
 - Manage the boundary in future conversations with this mentee
 - Provide a wider range of practical help without getting sucked into the mentee's problems
 - Separate your own feelings and motives from the mentee's.
5. If appropriate and with the mentee's permission, discuss with the mentee's professional therapist or counsellor how you will work in concert to support the mentee; or whether it is best to back off from the mentoring relationship until the mentee has sorted out their emotional problems.
- *The role of the mentor and the role of the line manager.* It's easy for the mentor to get over-involved in the mentee's current work and technical skills – and hence to tread on the line manager's toes. When discussing current work issues, both mentor and mentee should consider:
 - Has the mentee had the conversation they need to have about this with their line manager?
 - If not, is the purpose of this conversation to help them prepare for that conversation (a legitimate mentoring activity) or to do the line manager's job for them (not a legitimate mentoring activity)?
 - Is this the best use of our valuable time together?
 - Is there a more appropriate learning resource available (for example, a skilled colleague, or a training programme)?
 - How can we avoid undermining the line manager?
 - *The mentee's issues and those of the mentor.* When we listen to other people empathetically, it's inevitable that we make comparisons with our own experience and our own concerns. It's easy then to cross the line into viewing the other person's issue through the lens of your own. Any time you find yourself thinking or saying, "Yes, I know exactly what it's like", there is a danger that you may project in this way. To prevent this happening, ask the following questions from time to time during the mentoring conversation – and particularly when you feel a strong emotional resonance with their situation:
 - Am I seeing this issue from their perspective or mine? Or a mixture of both?

- How can I put aside my own experience and feelings to concentrate more fully on what's happening for them?
- *Developmental and sponsorship mentoring.* It's very easy for a relationship that was all about learning to slip into one where the mentor is expected to use their influence directly on the mentee's behalf. Rather than drift into this situation, it's important to:
 - Recognise and discuss that this is a change in the mentoring contract. The mentee should accept that the mentor may not want to shift into a sponsorship role (and generally, the more experienced they are as a mentor, the more reluctant they will be to do so).
 - Review the situation against the programme guidelines – is this combination of roles acceptable within the programme? Many programmes separate sponsoring and mentoring, so it may be necessary to choose which of these roles the current mentor will play from now on.
 - Be open about the change of contract. If appropriate, discuss the shift with other stakeholders, such as the programme manager and/or the mentee's line manager.
 - In your regular relationship reviews, check from time to time that the learning emphasis of your conversations has not been lost

Warning signs of reaching a boundary

You are likely to have reached a boundary if you:

- Feel overly drawn into an issue
- Feel that you lack the professional expertise to help
- Are being dragged down into the minutiae of the mentee's job role
- Are having difficulty stepping back from an issue
- Simply have an intuitive feeling that this isn't a conversation you should be having.

CHAPTER 13:

Some straightforward tools and techniques

The following are examples of tools that can be used by both mentor and mentee to underpin their conversations. There are many, many more. The two volumes of *Techniques for Coaching and Mentoring* (Megginson and Clutterbuck) are a useful resource for more.

To identify issues to bring to mentoring

When there are several weeks between meetings, it's easy for issues to come and go, without being brought into the mentoring conversations. Keeping a Frustration-Elation Log (FEL) is a simple way of capturing these issues and also of recognising recurrent patterns. Once a week, the mentee writes down a few sentences on each of a number of things that have really pleased them about their work and career progress (and, if they want, about things outside of work and career); and the same about things that have really frustrated, disappointed or annoyed them.

In making these notes, consider questions such as:

- When did I feel really “in flow” and when did I feel stuck or lethargic?
- When was I pleased and displeased at other people's reactions?
- What did I feel grateful for and what did I feel resentful about?

After a few weeks, you will have a useful database from which recurrent themes will recur. Sharing this database with the mentor and with other people they trust, who are likely to notice other themes and patterns, gives the mentee valuable information about themselves and a rich seam of topics to explore in the mentoring conversation.

To clarify how to achieve difficult, complex goals

People often fail to start working towards a goal, because they can't envisage the path towards it. Having a mentor helps, because they can glean some information from talking about the mentor's path to where they are – however, this may not always be relevant and the path for the mentee may be different. (For example,

because times have changed, they are starting at a different point, and/or they have a different set of skills and personality traits.)

Using a logic tree helps the mentee envisage more clearly the steps they need to take to achieve their ambition. The starting point is to express the goal in as few words as possible. For example, “I want to become a finance director”. Next is to ask the question, “What would have had to happen for you to achieve that?” A number of statements will emerge. In this example, these might include: “Qualify as an accredited director”. “Understudy a finance director”, “Gain wider experience across the finance function”, “Build relationships with a specialist headhunter” and so on.

For each of these statements, repeat the question “What would have had to happen for you to achieve that?” Keep doing so until you have covered a large sheet of paper (you may need several sheets of flipchart paper fixed together) and have reached the point on each of the roots of the logic tree, where you can label items “Things I can do now”.

The logic tree provides a practical roadmap for change. Mentor and mentee can use it to check progress and focus on specific bottlenecks. People who use the logic tree find it highly motivating, particularly if they had previously not pursued their goal actively, because they didn’t know where to start. In some cases, too, the mentee’s response to the logic tree is to recognise that they are unwilling to invest the amount of time and energy that will be needed – so they move on to a different goal, which they are more able to commit to.

To make difficult choices

A simple approach here is the Change Balloon. The mentee lists all the important “wants” from a decision – say, all the things they would want in their ideal new house. Each want becomes a sandbag on the outside of a drawing of a hot air balloon. First, the mentee imagines what it would be like to have all of these wants. Then, the mentor points out that the balloon has a leak. A sandbag has to be thrown overboard – which one will it be? As the leak worsens, more and more sandbags are jettisoned, in order of their importance. When only two are left, the mentor asks “Do these intuitively feel the highest priorities for you?”.

To quantify things that are difficult to pin down

Scaling is a technique widely used in coaching. In its most common form, it involves questions such as:

- If you were to put a number between 1 and 10 on how well you are doing right now, what would it be?

- What do you want to raise it to?
- If you are at three now, what would it take to raise it to four? And five? And six? Etc.

Among the benefits of scaling is that it helps people focus on the future and on both the larger goal and the short-term steps towards it. Among the downsides is that it is easy to overuse the approach so that it becomes mechanical – so use it sparingly!

To be more creative in the mentoring conversation

Consider the question: “What would be the impact of doing exactly the opposite of what you do now?”

To explore issues of work-life balance

The mentee opens up a series of accounts at the *Bank of Me* – one each for time, emotional energy, mental energy and physical energy (TEMP). How much TEMP do they have available each week? Who makes demands on their TEMP? What decisions do they need to make to avoid becoming overdrawn? If they do go into overdraft, what is their strategy for getting back into the black?

CHAPTER 14:

Getting started - the first meeting

In the first meeting, as in all subsequent meetings, preparation is essential. The mentee should spend at least an hour (it doesn't seem to matter whether this is concentrated time or a few scattered shorter periods) thinking about the issue and how they can best present it to the mentor. Putting these reflections into a short email both helps with this thinking through process and gives the mentor time to reflect and prepare as well. Useful questions the mentees can ask themselves here include:

- What are my medium and long-term career goals?
- What is important to me? What do I value most?
- What do I know about this situation? What am I assuming, but don't really know? What knowledge or understanding might help me be clearer in my own mind?
- What would help my mentor understand this issue? Can I provide some practical examples?
- What am I looking forward to in this conversation and what do I have some concerns about?
- How honest am I prepared to be in sharing those concerns?
- What can I do to make sure I come to this meeting in an appropriate frame of mind?

For the mentor, it can be helpful to prepare by reflecting on questions, such as:

- In what ways can I be of most use to the mentee? (e.g. stimulating their learning, helping them make choices and decisions)
- How have I helped other people in developmental conversations?
- How will I make sure that I don't dominate the conversation, or impose my views and experience on them?

CHAPTER 15:

Using different media

Most mentoring happens face-to-face, but mentoring using distance media is increasingly common and many mentoring programmes now rely entirely on meeting by telephone or email. Mixed media mentoring is also common, where mentors and mentees meet sometimes face-to-face, sometimes using distance media.

Email mentoring is effective because:

- It can take place in real time, just-in-time as issues occur
- It can occur in short bursts, which are easier to find than slots of an hour or more
- It provides a written record, which can be useful in revisiting a conversation
- If the conversation is asynchronous (i.e. not simultaneous), it provides built-in reflection time – as a result both the mentor's questions and the mentee's responses tend to be more considered
- Any power differential between mentor and mentee has much less influence on the conversation than in a face-to-face environment.

However, in using emails for mentoring it is important to maintain the rules of email etiquette (capital letters indicate shouting, for example, and filling up the other person's inbox with massive files is seen as bad manners). There is also a potential issue of confidentiality, because many organisations routinely monitor employee emails. Make sure you cover these issues in the initial contracting stage of the relationship.

Telephone mentoring also has a place, but it requires a lot of skill to do well and has some built-in disadvantages. One is that it is hard to create thinking time, because telephone silence stimulates anxiety. (Is the other person still on the line?) This can make the conversation shallower. The limits of concentration on a telephone call are also lower than using other media – a maximum of 45 minutes is recommended. Adding visual information (via Skype or teleconferencing, for example) can help, but the quality of signal and time delays can be a problem.

If in doubt, experiment to see what works for both of you.

CHAPTER 16:

How to be an effective sponsorship mentor

When sponsorship mentoring is at its most effective, the mentor ensures that there is an appropriate balance between sponsoring (doing things for the protégé, giving them advice etc), it incorporates much of the behaviours and mind-frame of developmental mentoring. The greater the emphasis on learning, as opposed to “godfathering”, and on the quality of thinking in the mentoring conversation, rather than on what the mentor can do for the protégé, the richer and more productive the relationship.

Among the challenges of being an effective sponsorship mentor are:

- The likelihood of reduced openness and honesty, because the protégé feels the need to impress the mentor and maintain their good opinion of their potential
- Because the relationship places greater emphasis on personal friendship, rather than professional friendship, it has greater potential to induce dependency, or sometimes counter-dependency (where the protégé outgrows the mentor and comes to resent their interference)
- Putting the mentor’s experience into perspective. Circumstances for the protégé may be very different at this point in their career journey compared to when the mentor was at the same point. Moreover, it can be hard to put yourself in the protégé’s shoes (and for them to put themselves in yours), if the gap in experience is large, particularly when there is also a large hierarchy gap.

Some useful groundrules for effective sponsorship mentoring, therefore, are:

- Put a lot of effort into the initial contract – what the mentor will and won’t do on the protégé’s behalf
- Don’t let the hands-on, directive elements of the relationship dominate – keep the focus on learning
- Confront the issue of openness and honesty up front, in the initial contracting, and review from time to time

- Where possible, try to park the mentor's greater authority and power – this will be easier, if you can establish something of the two-way learning environment of developmental mentoring
- Before taking action on the protégé's behalf, the mentor should always look first for ways in which the protégé could achieve the same outcome, by their own efforts
- The mentor must keep their own experience in perspective – they are there to provide signposts, not to pave the path for the protégé
- The protégé may often ask for advice – don't rush to provide it. Instead, spend time really understanding their situation and needs, before discussing what specific knowledge would be most helpful to them. In general, it is best for the mentor never to offer advice without being asked for it, with the exception of circumstances where they appear to be headed into a major mistake. On the protégé's part, before asking for advice, think through what you already know about the issue, and what specifically you want advice on (i.e. don't ask for advice generally)
- Set a time limit on the formal mentoring relationship and work together to ensure the protégé is able to fly the nest as soon as possible
- Don't see the protégé as an extension of yourself and your career
- Instead of steering them through the organizational or professional politics, help them develop their own political astuteness and use you as a sounding board for how they approach issues
- If you recruit the protégé to your team, the dynamics of the relationship will change. You may also get a lot of negative reactions from other team members, who feel they have lost rank. Think carefully before making such a move. If you decided to go ahead and the protégé also thinks it's a good idea, it is recommended that you end the formal mentoring relationship and encourage the protégé to seek another mentor, outside your department.

CHAPTER 17:

How to continue to develop as a mentor

If you are part of a well-managed mentoring programme, both you and the mentee will have been through some initial training, and there will be subsequent opportunities for “top up” training over the coming months. However, it is helpful to create for yourself a Mentor Development Plan – a personal strategy for how you will continue to grow your comfort and expertise in your role as a mentor. Some guidelines here are:

- Keep a learning log. After each mentoring session, take time to reflect and take notes on your learning – both from how you managed the conversation and from what you learned from the mentee. You will find it helpful to review these notes from time to time.
- Join a mentor circle – a group of peers, who are also mentors – with whom you can share ideas, concerns and issues. If you need a little mentoring from time to time, you may be able to use another member of the circle in this capacity.
- Read more about mentoring. The Further Reading section at the end of this resource is a good starting point.
- Seek feedback from your mentee(s) and use this to update your plan.
- If you have access to supervision, check in from time to time on boundary issues, or simply to assess your progress against your Mentor Development Plan.
- Look for future mentees to people who can stretch you – perhaps because they come from a very different cultural background.

CHAPTER 18:

Frequently asked questions

1. Can you combine the roles of mentor and line manager?

While this is common in sponsorship mentoring, it doesn't work in developmental mentoring, for several reasons:

- It's difficult to be totally honest with your boss, even if you get on well with them
- It's equally hard for the boss to be totally open and honest with direct reports – there may be lots of knowledge he or she is constrained from passing on
- Managers can't normally be a mentor to everyone in their team (and if they try, some people get more mentoring than others), so this creates divisions within the team

2. Why do participants need to be trained?

Being effective as a mentor requires conscious attention to the required skills and behaviours. For example, untrained mentors often tend to spend far too much time talking and not enough time listening. Broadly speaking, where neither mentor nor mentee is trained in their roles, only about 30% of relationships deliver significant learning. Where mentors are trained, the proportion rises to about 60%. Where both mentors and mentees are trained and supported after training, and where line managers are briefed, the proportion rises to well over 90%.

3. Our relationship has run out of steam – what can we do?

This is sometimes called “relationship droop” and the most common reason is that mentor and mentee have dealt with all the simple, short-term practical issues, but have not yet got into the deeper and longer-term issues. Sometimes, the mentee isn't ready to do that – in which case, you can reduce the frequency of meetings until they are. Most relationships can get into greater depth (and therefore deliver more value) if you:

- Review the relationship together, paying particular attention to the level of mutual trust and the relationship purpose

- Focus on the mentee's medium- to long-term career. What key experience and what shifts in perspective and understanding will equip them for the roles, to which they aspire?
- Work around questions like the following:
 - *Is your career something you will let happen to you, or something you will actively steer?*
 - *How much are you prepared to challenge yourself, now and in the future?*
 - *What's the gap between who you are and the person you want to become... and how much do you want to bridge that gap?*
 - *Do you have the courage to make your dreams happen?*

4. What should we tell other people about the mentoring relationship?

The mentoring relationship is private, in the sense that no-one else has any right to know what mentor and mentee talk about, but the existence of the relationship is not secret. It sometimes happens that immediate bosses ask for information about the mentoring conversations. The appropriate response is normally a polite no, unless mentor and mentee have agreed beforehand that specific information can be shared.

5. What do we do if it's not working?

The first thing to do is be open with each other. It's good practice to review the relationship every few meetings, and certainly after the first two meetings. If you decide the match is wrong, that's OK – in a small proportion of pairs, either the chemistry isn't right or the mentor's experience doesn't match what the mentee needs. Most formal mentoring programmes have a re-matching process, which you can take advantage of. This tends to work especially well, when mentor and mentee are able to present a combined picture of the ideal mentor for this mentee. Anecdotal evidence suggests that, where this disengagement is handled positively, the relationship often re-forms at a later date, when the mentee's needs change.

6. What resources will be there to support us?

In a well-structured programme (for example, one that meets the International Standards for Mentoring Programmes in Employment), mentors and mentees should have access to support in matching, training in their roles, both initially and as the relationship develops and guidance as needed from a professional supervisor or programme manager. Many programmes also include a mutual

support group for mentors, mentees and both; and a library of background information for participants to access when they need it.

If none of these are available, you can build your own on-line network, using social networks such as LinkedIn and develop your own information resources. The further reading in section 19 is a good starting point for this. Another practical step for mentors is to find a more experienced mentor, whose experience you can tap into. (Effectively a mentor to mentors!)

7. How helpful are psychometric instruments?

Psychometrics can be very useful in several ways:

- Building rapport between mentor and mentee, by helping them understand how each other thinks and to appreciate the differences each brings to the relationship
- Helping the mentee understand their own motivations and behaviours, and what lies behind their strengths and weaknesses
- Giving the mentor insight into some of the factors that may be helping or assisting the mentee in making progress

The downside to psychometrics is that they typically require special training to administer them and to help people interpret the results accurately. It is not often possible to equip mentors with these skills.

The safest and most practical way of using psychometrics is for them to be administered by a trained professional, who can help the mentee draw out specific lessons and insights. It is these lessons and insights that should be shared with the mentor – not the raw psychometric data, which they may misinterpret.

CHAPTER 19:

Further reading and resources

Books on mentoring by David Clutterbuck

- *Everyone needs a mentor*, CIPD
- *Supporting Diversity Mentoring Programmes*, McGraw-Hill (with Kirsten Poulsen and Fran Kochan)
- *Techniques for Coaching and Mentoring*, volumes 1 and 2, Butterworth-Heinemann (with David Megginson)
- *Mentoring in Action*, Kogan Page (with David Megginson, Bob Garvey, Paul Stokes and Ruth Garrett-Harris)
- *Mentoring and Diversity*, Butterworth-Heinemann (with Belle Rose Ragins)
- *The Situational Mentor*, Gower (with Gill Lane)
- *Developmental Alliances*, CIPD, London
- *Implementing Mentoring Schemes*, Butterworth-Heinemann (with Nadine Klasen)
- *Virtual coach, virtual mentor*, Information Age Publishing (with Zulfi Hussain)
- *Powerful questions for coaches and mentors* (App from David Clutterbuck Partnership)

Other useful books on mentoring

- Ensher, E & Murphy, S (2005) *Power Mentoring*, Jossey-Bass
- Garvey, R, Stokes, P & Megginson, D, *Coaching and Mentoring: Theory & Practice*, Sage
- Kram, K (1985) *Mentoring at Work*, University Press of America
- Poulsen, K (2012) *The Mentor+ Guide*, KMP+ Forlag, Copenhagen
- Ragins, BR & Kram, KE (2007) *The Handbook of Mentoring at Work*, Sage

- Whitaker, M & Cartwright, A (2000) *The Mentoring Manual*, Gower

Professional organisations

European Mentoring and Coaching Council www.emccouncil.org

International Mentoring Association www.mentoring-association.org

COMENSA (Coaching and Mentoring South Africa) www.comensa.org.za