

This document provides steps and tips in developing formal mentoring programs. A sample mentoring program document has also been provided to assist you set up your own program.

**MENTOR’S TOOLKIT**

**Section 1: Introduction to Mentoring**

Mentoring is one of the most effective and rewarding ways of developing your workforce talent. In this introduction, we will explore the close relationship between mentoring and coaching. Section 2 provides a basic mentoring process to follow with your mentee. Section 3 offers a variety of mentoring tools to draw upon.

**What is mentoring?**

Mentoring is a relationship designed to build confidence in a mentee and support them in their development through the modes of coaching, teaching, training, advising, counseling, and facilitating.

**Coaching vs Mentoring**

The terms coaching and mentoring are often used interchangeably, and though they share many of the same practices and aims, coaching and mentoring are different. While coaching uses powerful questioning to support people, mentoring draws upon a wider range of modes to support mentees. Let’s look at the focus of coaching and mentoring in more detail.

**Coaching** Focuses on Question-Asking

Coaching in its purest form limits itself to asking questions and making observations about what the person says. This self-imposed limitation on the coach is grounded in the belief that understandings and solutions are best arrived at through asking powerful questions, not by giving people the answers up front. Not every question can be a powerful question. Most questions beat a pathway that can culminate in a powerful question.

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| --- | --- |
| Open quotation mark with solid fill | A powerful question takes you into a different place, from which you can look at an issue in a different way that gives you different options for resolving that issue  **David Clutterbuck** |

This primary focus on question-asking might sound counter-intuitive since a mentee often seeks out a mentor to draw upon their depth of knowledge, skills, and experience. However, the question-asking approach seeks to empower the person to try to find all or part of the answer themselves first, which in turn generates more ownership of the issues, solutions, and actions to be taken.

This means the coach doesn’t need to be an expert in that person’s profession or role, but rather the coach specializes in asking the right questions – often questions the person is not capable of asking themselves because they are too close the issues they are trying to figure out.

**Mentoring** Shifts Between Modes

Mentoring, on the other hand, draws upon multiple modes of engaging with the person, including coaching but also teaching, training, advising, counseling, and facilitating. A mode is a way in which something is done or experienced.

See *Table 1 – The Six Modes of Mentoring* for descriptions of each mode. Also, see *Table 2* for a summary of the key differences between coaching and mentoring

**Table 1 – Six Modes of Mentoring**

|  |  |
| --- | --- |
| **Coaching** | Partnering with a person in a thought-provoking and creative process that inspires them to maximize their personal and professional potential[[1]](#footnote-1) |
| **Teaching** | Developing knowledge by telling the person what they need to know such as how to develop a high-functioning team |
| **Training** | Building skills by showing a person how to do something such as managing budgets in Excel |
| **Advising** | Advising the person what course of action to take such as what qualifications to pursue to be considered for a specific promotion |
| **Counseling** | Acting as a confidant and sounding board to help the person clarify the real issues, see the bigger picture, solve problems, and make difficult decisions |
| **Facilitating** | Enable the process that will help the person pursue and achieve their goals such as arranging a meeting with someone important to their career |

The mentor will often switch seamlessly, even unconsciously, between these various modes and draw upon all of some of them during a session with a mentee.

**Mentor** Appointed or Chosen

Should a mentor, or even a coach, be chosen by the individual or appointed by the organization? Well, it depends on situational factors, and more specifically on the degree of trust that can be established between people. The process should support the outcome.

Trust is the element that is essential for both mentoring and coaching. Both people need to feel comfortable with each other. Some of the best mentoring or coaching relationships occur organically in the workplace, and are sometimes never even formalized, while others are set up through an established organizational process. Even when a mentor or coach needs to be appointed, both parties should be comfortable going forward together.

**Table 2 – Key Differences Between Coaching and Mentoring**

|  |  |
| --- | --- |
| Coaching is more … | Mentoring is more… |
| Short-term | Long-term |
| Contractual | Relational |
| Skills development and problem solving | Career and personal growth |
| Emphasis on asking powerful questions | Shifting between modes of interaction |

|  |  |
| --- | --- |
| Open quotation mark with solid fill | A mentor is someone who allows you to see the hope inside yourself  **Oprah Winfrey** |

**Mentor Qualities**

Mentors tend to demonstrate many great qualities from being exceptionally good listeners to being well respected within their professions. But the truth is that naming the outstanding qualities of a mentor is easier than to find someone who embodies all of them. Throughout their careers, people need a variety of mentors and experiences for their development.

As a mentor, you are part of the answer, not all of it. Fulfill your important part in the person’s life and you will feel authentic and helpful throughout the relationship.

Mentors typically value the following foundational qualities:

1. Are successful and respected members of their organizations or fields
2. Set high standards and then role model their expectations
3. Develop good chemistry with their mentees
4. Demonstrate listening, empathizing, counselling, and nurturing
5. Make themselves available to their mentees
6. Have access to people, information, and resources that can help mentees in their careers
7. Orchestrate developmental opportunities for those they mentor by steering mentees into important tasks, projects, teams, or challenging work
8. Identify how their mentees learn best: through discussion, direct experience, or other methods

**Section 2: Mentoring Process**

Working from a structure is helpful in mentoring. You can facilitate the mentoring process through the following four stages:

1. Preparation
2. First Meeting
3. Sessions
4. Closing

Let’s look at each of these stages in more detail.

**Stage 1 – Preparation**

The preparation stage refers to everything that happens before you meet face-to-face. There are at least three things to consider:

**1. Self-Reflection**

Start by identifying why you want to mentor and what you believe you can contribute.

**2. Initial Contact**

Do some preliminary work with your mentee such as a short email exchange of questions.

* The exact questions will depend on your situation, but a good question from you would be to find out their preliminary thoughts on what they hope to achieve with you through the mentoring process.
* You might also want to ask about their professional journey to date, highlights in their career, or details about their current role.
* Invite the person to ask you questions in return, which is a fundamental part of co-creating the relationship as opposed to the mentor leading it.

**3. Date, Time, Location**

Schedule a mutually agreeable date, time, and location to meet.

* Set aside at least 90 minutes for your first meeting or even 2 hours or more depending on your schedules, familiarity with each other, and what you might be talking about. You need time to establish rapport, trust, and goals. The sessions that follow will be shorter.
* Find a location that is convenient for both of you to get to, preferably out of the office for the first meeting.
* It would also be good to exchange text numbers so that you can let the person know if you happen to be late or need to reschedule at the last minute for some unforeseen emergency.

**Stage 2 – First Meeting**

The focus of your first meeting is to establish the goal(s) you are working towards, as well as the rapport and trust for you mentor-mentee relationship.

**1. Establish Agreement**

Use an open-ended conversation in which mentor and mentee get to know each other better, establish rapport, and follow the basic outline to reach agreement on essential elements of the relationship. See the chart below for an understanding of the mentor and mentee roles in establishing agreement.

|  |  |  |
| --- | --- | --- |
|  | Mentor Role | Mentee Role |
| **1. Build rapport** | Take the first 10 to 15 minutes to ease into the session. Catch up on news, listen, and ask questions | Take the time to ask your mentor about what is new or interesting in their lives. Catch up on news, listen, and ask questions |
| **2. Discuss the mentee’s needs** | Ask questions, listen, and take notes | Explain where you are at in your career and growth, what you would like to work on |
| **3. Determine match** | Ensure there is a match between what the mentee needs and what you can provide | Be open to more ideas. You might not only get some or all of what you want, but also what might be good for you |
| **3. Set goal(s)** | Write out the mentee’s goal(s) | Set one or more SMART goals that you can review after 3 months |
| **4. Agree on responsibilities** | Set out what you will be responsible for | Same |
| **5. Set a timetable** | Decide when, where, and how many times you will meet (this can change according to needs) | Offer to send a meeting reminder the day before each session date |
| **6. Agree on meeting times** | Check your calendar for suitable times | Find dates and times that fit into both schedules |
| **7. Insist on confidentiality** | Agree that you will never talk about anything from your discussions with anyone else unless you both agree | Same |

**See *Tool 1: First Meeting Notes* to keep track of goals and agreements**

**2. Take Notes**

Take notes as you discuss, especially on the goals and responsibilities you agree upon. They need to be clear, concrete, and written down. Later they can be revised and expanded as necessary.

**3. Co-Create Relationship**

Create a safe, supportive environment that produces ongoing mutual respect and trust:

1. Demonstrate genuine concern for the mentee’s welfare and future
2. Show personal integrity, honesty, and sincerity
3. Establish clear agreements
4. Keep promises
5. Show respect for the mentee’s perceptions, learning style, and personal being
6. Provide ongoing support for and championing of new behaviours and actions, including those involving risk-taking and fear of failure
7. Ask permission to engage with the mentee in sensitive or new areas
8. Use relevant tools to gain a more sophisticated understanding of the mentee’s background, experiences, strengths, limitations, and individual identity

|  |  |
| --- | --- |
| Open quotation mark with solid fill | A great mentor has a knack for making us think we are better than we think we are. They force us to have a good opinion of ourselves, let us know they believe in us. They make us get more out of ourselves, and once we learn how good we really are, we never settle for anything less than our very best  **Prometheus Foundation** |

**See *Tool 3: GROW Model* for a structured set of questions to follow for goal setting and follow up sessions**

**4. Establish Mentoring Presence**

Be fully present to create a positive relationship using an open, flexible, and confident style:

1. Be present and flexible during the mentoring process
2. Trust your inner knowing (going with your gut)
3. Be open to not knowing and take respectful risks, if necessary, in your question-asking
4. See many ways to work with the mentee and choosing in the moment what is most effective
5. Use humor effectively to create lightness and energy
6. Shift your perspectives and experiment with new possibilities in your approaches
7. Be open with your mentee in terms of your own professional challenges and how you overcome them, as well as the things you are proud of in your career so far

You might consider giving your mentee the opportunity to “interview” you as a way for them to get to know you and appreciate the successes and challenges of your own professional journey.

**See *Tool 4: Mentee Questions to Interview Mentor* for a structured set of questions to follow for goal setting and follow up**

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| Open quotation mark with solid fill | People will forget what you did, but people will never forget how you made them feel  **Maya Angelou** |

**Session Dos and Don’ts**

The following are a list of things to avoid and good practices to follow for your first meeting and in the sessions that follow:

**1. Process**

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| --- | --- |
| **Don’t** | Treat your mentee as anything less than a full partner in the process |
| **Do** | * Facilitate the mentoring experience as opposed to leading it * Collaborate to establish the mentoring process * Set aside extra time if necessary to build rapport and trust |

**2. Goals**

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| --- | --- |
| **Don’t** | Tell the mentee what goals you think they should have |
| **Do** | * Co-create the goals with the mentee * Review and update goals as your journey in the relationship and more information becomes known |

**3. Solutions**

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| --- | --- |
| **Don’t** | Jump to telling the mentee what to do or how to do it |
| **Do** | * Take an enquiring approach versus a telling approach by using mentoring presence, powerful questioning, and creating awareness to produce mentee generated actions and accountability |

**4. Agenda**

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| --- | --- |
| **Don’t** | Set the agenda and discussion topics for the session |
| **Do** | * Explore what the mentee wants from each session, establish the measures of success for that session, and make sure both of you are clear about the overall mentoring purpose * Check in with the mentee that they believe you are moving towards what they wanted from the session * Allow the mentee full input into the issues that should be discussed relative to the mentee’s stated goals for the session |

**5. Talking Time**

|  |  |
| --- | --- |
| **Don’t** | Show more interest in your own view of a situation than the mentee’s, or your own performance or demonstration of knowledge about the topic |
| **Do** | * Invite the mentee to share their thinking on an equal level by asking about their thinking around the situation, or their goals regarding the situation * Set a sheet of paper between you to make ideas visually clearer, make connections, go off script, or get back on task, etc. |

**6. Structure**

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| --- | --- |
| **Don’t** | Forget to consolidate your notes after your first meeting into a basic mentoring plan for you and the mentee to follow |
| **Do** | * Write out the mentoring purpose (mentee’s main SMART goal) * Develop a rough plan for each session with the goals, topics, and activities, etc. that support the overall mentoring purpose * Provide the mentoring plan to the mentee for their input * Use this as a working document that you can adjust with the mentee as you progress through the sessions |

**Stage 3 – Sessions**

**1. Number**

Most formal mentoring relationships are not forever. It is important to determine an agreed-upon number of sessions, and then revisit that decision later if you agree to another set number of sessions. A set number of sessions helps both mentor and mentee maximize the time.

**Mid-point review**

If your organization implements a formal mentoring program, it is recommended that a mid-point review be done to assess how the mentoring program is working for all mentors and mentees. At this point, a mentor and mentee can decide to continue with more mentoring sessions or to end the mentoring relationship. Concluding a mentoring relationship early should be done if it is mismatch or if the mentee would benefit from being mentored by more than one person.

**2. Frequency**

A good guideline is to give at least a week between mentoring sessions and no more than a month. A week gives both mentor and mentee time to process and act on the session insights, but more than a month may result in a loss of momentum in the relationship.

**3. Duration**

The sessions that following the first meeting tend to be shorter, about 60 minutes, though you might schedule up to 90 minutes for specific reasons. Keeping sessions to about an hour has several benefits:

1. It motivates both mentor and mentee to make the best of the time allotted
2. It ensures that the number of insights and actions are manageable versus having too much to process or do before the next session – our brains and bodies need time and space to incorporate lessons learned
3. It puts the focus on implementation between sessions, versus length of mentoring session

Otherwise, schedule the time accordingly, such as when there is a more complex issue to work through.

**4. Agenda**

Use the following agenda in an open and flexible way to facilitate the session with the mentee.

**Opening (5 to 10 minutes)**

1. Reiterate the goals the mentee has set
2. Review any ideas, activities, results, reflections, or conclusions from the previous session
3. Acknowledge the mentee for what they have done, learned, or become aware of since the previous session(s)
4. Follow up on any between session assignments
5. Confirm, review or co-create the session agenda, including goals and focus on any other items

**See *Tool 2: Powerful Questions* to guide your opening discussions as needed**

**Interaction (30 to 40 minutes)**

1. Communicate well by listening actively, asking probing questions, and speaking directly
2. Facilitate growth in the mentee by creating awareness, designing actions for ongoing learning, and managing progress and accountability
3. Take notes
4. Stay open to changing the goal or focus of the session if you and the mentee agree on a new direction in line with the mentoring purpose

**See *Tool 2: Powerful Questions* to guide your main interactions as needed**

**Closing (5 to 10 minutes)**

1. End on time, or agree to extend the session if necessary
2. At the end of the set time, summarize what you have discussed
3. Ask for the mentee’s reflections on the session
4. Share your reflections on the session
5. Set any between-session assignments
6. Confirm next session date and who will send a reminder the day before

**See *Tool 2: Powerful Questions* to guide your session closings as needed**

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| Open quotation mark with solid fill | To be a mentor, and an effective one, one must care. You don’t have to know how many square miles are in Idaho, you don’t need to know what the chemical makeup of chemistry is, or of blood, or water. Know what you know and care about the person. Care about what you know and care about the person you’re sharing with.  **Maya Angelou** |

**Stage 4 – Closing**

Most mentoring relationships eventually come to an end. Mentors tend to be in the mentee’s life for a reason or a season (as the saying goes) as they journey in their careers.

**1. How to End**

In your first meeting, make sure you decide on how many sessions you will have together. This will help bring the mentoring relationship to a natural close. At the end of the mentoring relationship, do the following:

1. Review and sign off on the mentoring purpose
2. Help the mentee to identify any next steps
3. Self-reflect and review the effectiveness of the relationship
4. Discuss what went well and what you might do differently next time
5. Comment constructively on each other's handling of the role

**2. Staying in Contact**

The mentor might remain a trusted advisor, or act as a sounding board when the former mentee has a difficult choice to make on an important issue or opportunity. In your last session together, you can decide as the mentor whether this is a suitable offer to make and one that you would both be open to acting on in the future if the need arises. For example, you might agree to continue the mentoring relationship for another year, but only meet once a quarter, or twice over the year.

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| Open quotation mark with solid fill | Show me a successful individual and I’ll show you someone who had real positive influences in his or her life. I don’t care what you do for a living—if you do it well, I’m sure there was someone cheering you on or showing the way. A mentor.  **Denzel Washington** |

**Section 3: Tools**

**Tool 1: First Meeting Notes**

Use this document to take down information during the first meeting between mentor and mentee

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| --- | --- |
| **Opening Question**  For example:   * Tell me about two or three significant moments that have shaped you in your life or career * What led you to this time together with me? | NOTES |
| **Goal Storming**  For example:   * What is your perfect future? * Imagine yourself 3 months from now. What has the leadership program done in you? * In a year from now, what is different in you? In your circumstances? | NOTES |
| **Goal Setting**  What is the SMART goal we want to achieve by the end of the sessions? | NOTES |

**Responsibilities**

What is each of us responsible for to ensure the success of the time together?

|  |  |
| --- | --- |
| **Mentor** | **Mentee** |

**Meeting Schedule**

When, where, and how many times will we meet?

|  |  |  |  |
| --- | --- | --- | --- |
|  | **DATES** | **TIMES** | **LOCATION** |
| Session 1 |  |  |  |
| Session 2 |  |  |  |
| Session 3 |  |  |  |
| Session 4 |  |  |  |
| Session 5 |  |  |  |

**Confidentiality**

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| --- | --- |
| What do we agree is confidential? |  |
| Is there anything we are comfortable sharing with others about the mentoring experience? |  |

**Tool 2: Powerful Questions**

Use the following general guidelines to facilitate effective question asking during sessions:

**Avoid These Question Types**

Not all questions are equally good. One way to ask good questions is to avoid asking the following effective question types:

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| --- | --- |
| **Closed-Ended** | Questions with yes/no answers usually have your assumptions embedded in it e.g. Are you worried about something? |
| **Two Option** | Also closed-ended but with two options that are still your assumptions e.g. Are you worried about something, or do you have too much work? |
| **Stacked** | Asking two or more questions in the same sentence e.g. What do you feel when this happens and what do you do to deal with it? |
| **Why** | These often result in simplistic, single reason responses that are at the forefront of the mind in that moment e.g. Why do you think you are not able to turn off work? Instead of asking why, ask “what reasons…” which can cause deeper reflection and result in multiple responses |

**15 Powerful Questions**

Below is a list of 15 powerful questions that you can use to support you as you engage the mentee at the start of the session, during the session, and to close off the session.

**Opening Questions**

The questions below are useful at the start of a session:

|  |  |  |
| --- | --- | --- |
|  | **Question** | **This question can be powerful because it…** |
| 1. | **What is on your mind?** | Is neither too broad nor too narrow, and it helps to surface what is most pressing on their mind |
| 2. | **What do you need to let go of?** | Helps the person let go of immediate worries and focus on the goals of the session |
| 3. | **What are you most grateful for?** | Helps the person start form a positive mindset |
| 4. | **What are you most proud of?** | Helps the person start form a self-confident mindset |

**Core Questions**

The questions below are useful during a session:

|  |  |  |
| --- | --- | --- |
|  | **Question** | **This question can be powerful because it…** |
| 5. | **Where do you want amazing results?** | Lifts their expectations higher than the limitations they may have placed on themselves |
| 6. | **What else?** | Helps person go to deeper into what they want or get to the root of their challenge. You can ask this question many times, until you believe the person has brought all they need to the surface |
| 7. | **When have you done this before successfully?** | Helps person realize that what they have probably overcome what are struggling to overcome in a previous situation in their lives, which can reduce anxiety |
| 8. | **What evidence do you have that what you are saying is correct?** | Get at any faulty assumptions about what is going on or what they should do |
| 9. | **If you knew you couldn’t fail, what would you try?** | Helps put fear on hold and get to what the person hasn’t considered or has dismissed as impossible |
| 10. | **How will achieving this goal impact others?** | Strengthens resolve |
| 11. | **What happens if you don’t achieve the goal?** | Strengthens resolve |
| 12. | **If you say yes to the goal, what are you saying no to?** | Makes room for the goal amid other less important but competing priorities |

**Closing Questions**

The questions below are useful towards the end of a session:

|  |  |  |
| --- | --- | --- |
|  | **Question** | **This question can be powerful because it…** |
| 13. | **What was most useful to you from this conversation?** | Supports deeper learning and transformation because person has a chance to reflect on what they just gained through the session |
| 14. | **What is the very first tiny step to take to turn your insight into action?** | Turns big goals into manageable steps that can build upon each other into a cumulative effect |
| 15. | **What do you want me to hold you accountable for when we meet at our next session?** | Increases likelihood of action to be implemented because the mentor is holding them accountable |

**Tool 3: GROW Model**

Use the GROW Model tool for a mentor-led planning session with the mentee

**Instructions**

1. To use this model, start in the goals column and ask some or all the questions in that column
2. When you sense the time is right to move to the next column, do the same and ask some or all the questions, and so on

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | **Goals** | **Reality** | **Options** | **Way Forward** |
| 1. | What is your goal? | Talk me through what is happening now in terms of your plans? | What can you do differently to overcome the challenges? | What actions are you going to take? |
| 2. | What do you hope to achieve through the goal? | What are you doing well that has led up to where you are now? | What is within/outside your control? | Where do you need help? |
| 3. | What values will the goal support? | What are you doing not so well that has led up to where you are now? | What do you think your options are? | Who will help you? |
| 4. | How will you be different in the end? | What barriers and obstacles have you faced? | What is the best/worst thing about each option? | When are you going to start? |
| 5. | On a scale of 1 to 10, how important is it for you to achieve this goal? | How have you contributed to it in any way? | What unconscious assumptions are you perhaps making? | How are you going to make sure you do it? |
| 6. | How will you know you have been successful? | What influenced your decisions? | If you didn’t have any limitations, what would you do? | On a scale of 1 to 10, how confident are you of achieving the goal? |

**Tool 4: Mentee Questions to Interview Mentor**

Use this tool as a mentee-led interview of the mentor

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| --- | --- | --- | --- | --- |
|  | **Journey** | **Development** | **Potential** | **Identity** |
| 1. | What were your goals at the start of your career? | What knowledge has been most useful? | Where does your confidence come from? | What values drive you and what formed them? |
| 2. | Think back five years. Did you see yourself where you are now? | Which leadership skills were the most difficult to develop? | Where do you still lack confidence? | What values does your role strengthen? |
| 3. | What are you most proud of and why? | Who has shaped your thinking? | What has been your biggest challenge and how have you approached it? | How would you describe your personal style? |
| 4. | What is one thing you would have done differently? | What do you wish you had learned early on? | Was there a role you moved into but didn’t feel qualified to do once you were in it? | What are you really good at? |
| 5. | What is one thing you wish you had done but didn’t? | What do you do to challenge your thinking? | What one thing do you still struggle with? | What character traits do you look for in people? |
| 6. | What is the most valuable lesson you have learned? | What is the most powerful leadership lesson you have learned and how has it proven useful? | What was your biggest failure and what have you learned from it? | How and where do you find inspiration? |
| 7. | What do you aspire to? What is your vision for your future? | What has influenced you the most? | What one thing could you do that if you did regularly, would make a significant and positive difference to your life? | How do you build trust? |

1. Definition from the International Federation of Coaches (IFC) [↑](#footnote-ref-1)