

MENTORING EXCELLENCE

Pocket Toolkit #1



➔ Strategies and Checklists for Mentors

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Successful mentoring relationships move through four phases. These four sequential phases—preparing, negotiating, enabling growth, and coming to closure—build on each other and vary in length.

In each phase, there are specific steps and strategies that lead to mentoring excellence. When missed or skipped over, they can jeopardize the success of a mentoring relationship.

This pocket toolkit offers strategies for success and checklists for mentoring excellence that can be used during each phase of the mentoring relationship. Use them to guide your mentoring conversations, gauge your progress, and promote mutual accountability. These checklists can also be used to determine readiness to move on to the next phase.



Strategies for Success

- Recall your own mentoring relationships. What worked for you and what didn't work?
- Be clear about what it is you want in a mentoring relationship.
- Consider what you are willing to contribute to this mentoring relationship.
- Think about the career challenges you faced and how they might differ from your mentoring partner's current challenges.
- Reflect on your greatest career successes and analyze what helped you succeed.



The preparing phase has two components, preparing self and preparing the relationship. Review the following items to make sure you are ready to move on to preparing the relationship.



- I have a sincere interest in helping this person succeed.
- I believe there is mutual interest and compatibility.
- I am clear about my role.
- I am the right person to help achieve this Mentee's goals.
- I can commit adequate time to mentoring this person.
- I am willing to use my network of contacts to help this individual.
- I have access to the kind of opportunities that can support this person's learning.
- I have the support that I need to be able to engage in this relationship in a meaningful way.
- I am committed to developing my own mentoring skills.

Strategies for Success

- Take the first step in initiating contact. Your Mentee will be eager to hear from you.
- Exchange resumes and background information before you meet.
- Take time to get to know each other.
- Share mentoring experiences.
- Talk about your Mentee's learning and development goals.
- Determine what your Mentee needs, wants, and expects from the relationship.
- Candidly share personal assumptions and limitations.
- Discuss personal and learning styles.



- We spent time up front getting to know each other.
- We shared our experiences about mentoring and those who influenced us.
- We articulated general learning goals.
- We discussed what we each needed from the relationship and our personal expectations.
- We defined the “deliverables” and desired outcomes.
- We discussed some possible options and opportunities for learning.
- We shared our assumptions about our roles.



Strategies for Success



- Decide how much time you can reasonably commit to the relationship.
- Write down the goals the Mentee is working on right now and analyze them to make sure they meet the SMART goal criteria.
- Agree on a format for discussion with your Mentee: formal agendas, topic-driven agendas, check-in conversations, etc.
- Use a journal to help you stay focused, monitor progress, and capture follow-up items.
- Talk about what you need to do to assure that there is mutual accountability in the relationship.
- Establish ground rules; talk about confidentiality, boundaries, and “hot buttons” with your Mentee.

- We have agreed on how we will safeguard confidentiality.
- We have clarified mutual responsibilities.
- We have clearly defined our mentoring goals.
- We are in agreement about how often to meet, and when and who should do the connecting.
- We have articulated criteria for success.
- We have developed a workable strategy for dealing with obstacles.
- We have formulated a work plan for moving forward.



Strategies for Success

- Check in with your Mentee regularly.
- Ask for feedback to determine if the pace of learning is on track, the learning experience is satisfactory, and the relationship is working.
- Balance candor with compassion in providing feedback.
- Provide timely support, offer a vision of possibility, and create appropriate challenges that facilitate learning.
- Encourage your Mentee to solicit feedback from multiple sources.



These signposts should be revisited throughout the mentoring relationship.

- I actively support my Mentee's learning.
- We use our time together productively.
- We regularly evaluate the quality of our mentoring interactions.
- We work at maintaining a high level of trust.
- We give each other feedback during our meetings.
- We make time to regularly reflect on our partnership.
- We are comfortable addressing difficult issues.



Strategies for Success

- ❑ Consider what you want your mentoring relationship to look like after the formal relationship concludes.
- ❑ Find a personal way to express your feelings to your Mentee about the experience.
- ❑ Allow your Mentee to show appreciation and graciously accept their thanks.
- ❑ Even if you are disappointed in the outcome, identify and express the positive benefits you gained as a result of being in the mentoring relationship.
- ❑ Take time to consider what you learned and identify what you will do differently in your next mentoring relationship.



- I was aware when it was time for closure.
- I evaluated my learning as a result of this experience.
- We used the protocols we had established to bring the relationship to closure.
- We adequately evaluated learning outcomes.
- We discussed application and integration of new learning.
- We acknowledged our accomplishments and celebrated milestones.



12 Strategies for Mentoring Success

1. Spend sufficient time getting to know your mentoring partner.
2. Meet with your Mentee face-to-face on a regular basis.
3. Always have a meeting date on the calendar.
4. Keep focused on achieving goals and not just day-to-day challenges.
5. Follow through on your commitments; hold your Mentee accountable for his/her commitments.
6. Be open to learning and new approaches.
7. Periodically reflect on what you and your Mentee are learning.
8. Hold your Mentee accountable for his/her growth and development.
9. Provide regular feedback; seek and welcome feedback from your Mentee.
10. Use your time well.
11. Expect to make mid-course corrections.
12. Check in and check things out.

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Other Toolkits

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Toolkit #3 Strategies for Mentees

Toolkit #4 Accountability Strategies and Checklists

Toolkit #5 Mentoring Across Generations

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