

How to Define, Design and Deliver the Right Type of Formalized Mentoring Program

by

William A. Gray, PhD

What not to do

Before contacting us, a major oil company had hired an external consultant to design a single Mentoring Program for 300 proteges. Because program and participant goals were ill-defined, many proteges were matched with the wrong mentor. Program delivery consisted of training proteges and mentors separately (each group trained for a week) – without a coordinator to oversee everything.

The result: 600 participants wasted their valuable time over 12 months, because mentoring did not enable proteges to meet their needs and achieve desired goals, nor did it reduce turnover or enable career exploration, as expected.

Why did this costly failure happen? The mentoring consultant was operating at the Novice or Advanced Beginner level [see table at end of article]. Consultants at these lowest levels might “know about” mentoring from readings or seminars, but lack the “practical know-how” needed to plan and align all components of a formalized program and then implement this so that intended outcomes are produced.

After the first year of operation, the oil company hired an outsider to be mentoring coordinator, with responsibility for salvaging the program and producing intended goals. He visited mentoring experts across North America and England to learn firsthand what each could provide, and then selected my partner (Marilynne Miles Gray) and myself because we had a proven track record of operating at the Expertise level with four other oil companies in defining, designing and delivering different kinds of successful formalized mentoring programs.

What to do: define and design the program

My partner and I went on-site for three weeks. Because we suspected that a single Mentoring Scheme was inappropriate for all 300 proteges, we evaluated the existing Scheme using surveys and structured interviews. This enabled us to identify three types of proteges, at different points in their career development, with different sets of needs, requiring different kinds of mentoring. While this was occurring, we helped the coordinator assemble a Mentoring Task Force, comprised of a representative from each of the 12 participating business units – to provide local coordination and be trained as trainers for the program.

With input from the Mentoring Task Force and focus groups (comprised of participants), we facilitated collaborative planning to define and design three different types of mentoring programs. Task Force members were invaluable in identifying program and protege goals that were appropriate to their particular business unit.

To meet the goal of getting newly hired university graduates up-to-speed faster, we designed an **Orientation Mentoring Program** in which capable peers would serve as mentors. Our *Protege Needs Inventory* enabled each protege to identify specific needs so that peer mentors could systematically provide needed assistance.

To reduce the costly turnover of high potentials – at a time when promotion was not possible -- we designed a **Career Expansion Mentoring Program** that enabled these proteges to expand their technical expertise by carrying out a carefully planned, highly challenging Mentor-Assisted Project™ in the mentor’s area of expertise.

To enable longer-term employees to explore and choose a career path that was best for them and for the company, we designed a **Career Path Mentoring Program**, in which top-level technical and managerial veterans would provide mentoring.

What to do: deliver the planned program

After defining and designing three distinctive mentoring programs for three distinctive groups of proteges, each program needed to be implemented or delivered. Because the Task Force representatives knew their own business unit needs/goals and participants, they were able to re-match the right mentor-protege partners for the right type of program.

Partners signed up to attend a 2-day **Mentoring for Results Partner Training**. We scheduled several optional 2-day trainings so partners could pick one they both could attend. Why train partners? Because this is the best way to produce multiple benefits. Very few partners know one another well before the training session. Our partner training provides a series of structured activities that enable partners to get to know one another and feel comfortable discussing real issues, so that actual mentoring occurs during the training session.

Using our *Protege Needs Inventory*, partners agree on needs to address and prioritize these into goals to be achieved. To enhance commitment and prevent problems, partners create a *Mentoring Agreement* by discussing and answering questions related to Expectations (e.g., Who will initiate meetings?), Concerns (e.g., What will you do if you don’t have enough time to meet?), and Desired Benefits.

To learn how to work well together, partners compare their preferred mentoring styles (identified by answering our *Mentoring Style Indicator*), watch a video that demonstrates how to use all 4 Mentoring Styles in a flexible manner, and then practice this together to resolve a challenging issue for which the protege needs various kinds of mentor assistance. Developing and using Mentoring Style flexibility prevents partners from “getting stuck” overly using a preferred style (e.g. self-reliant proteges often reject the mentor’s wise counsel, even when this is needed to be successful; 38% of the female proteges did this, and

their careers derailed when their informal mentors stopped providing assistance, according to the well-known book, *Breaking the Glass Ceiling*).

Thus far during the training session, partners have engaged in a lot of discussion. Now, partners create a *Mentoring Action Plan* that converts talk into actions that produce desired outcomes. Research by CSX Transportation on the benefits gained by 30 groups of mentor-protégé partners over a nine year period found that both mentors and their protégés in long-distance relationships reported the most benefits because they stuck to their Plan: they were prepared for meetings and actually met (via telephone, in person) when this was scheduled, instead of simply “doing lunch” or meeting in other casual ways.

To ensure ongoing delivery, we trained the 12 reps to provide Mentoring for Results Partner Training for new groups. And, the coordinator continued to function much like a helicopter in the air (overseeing the big picture) and on the ground (helping reps handle local issues).

Because it was carefully defined, designed and delivered, this Mentoring Scheme continued to produce intended outcomes for the next 10 years – for three very different groups of protégés and for their business units.

Level	Main Characteristics of a Mentoring Expert
Expert	Has at least 10 dedicated years focusing on a field (e.g., developing distinctive mentoring programs). Experience in field is broad and deep. Intuitively aware of important variables in any new situation. Able to use different paradigms and heuristics to solve problems quickly and creatively. Reflective practitioner who self-assesses what works/doesn't. Engages in “forward” reasoning to solve a problem. Able to align the right processes needed to produce multiple outcomes (develop competencies/talent and reduce turnover while involving the diversified workforce). Typically, this person develops the Guiding Principles and the rules of engagement.
Proficient	Has at least 5 years in the field, with some varied experiences. Still “rule-bound” when solving problems. Becoming a reflective practitioner. Can plan and implement several different types of mentoring programs, each of which produces a desired outcome (talent development <u>or</u> retention, for example).
Competent	Has repeated experience doing the same thing. (e.g., can plan and implement one type of mentoring program – such as for orienting new hires better, but not for developing leadership competencies).
Advanced Beginner	Knows “about” mentoring for specific circumstances and has limited practical know-how. Likely to implement simplistic “do-your-own-thing” mentoring initiative than a more formal program with structured components that produce intended outcomes. Doesn't feel responsible for producing outcomes.
Novice	Little or no direct practical experience or know-how. May have gathered information, read books or articles, but has no practical understanding based on actual experience.

The 5-level model above is based on several meta-analyses of other research on what it takes to become an Expert in a dedicated field of focus. See: Dreyfus, H. and Dreyfus, S. (2005). Expertise in real world contexts, *Organization Studies*, 26(5), 779-792

William A. Gray is the president of Corporate Mentoring Solutions Inc., in Victoria, British Columbia. He has a PhD from the University of Texas, and 30 years experience creating mentoring and knowledge-transfer programs and web-based software to facilitate such programs. Contact him at (250) 652-0324 or wgray@mentoring-solutions.com to find out how he has worked with Chevron, Shell, Exxon, BP, Mobile, Phillips, Pan Canadian Petroleum (now EnCana), Dow Chemical, Occidental Chemical and hundreds of companies in other industry sectors.

