

# Shell Mentoring Toolkit

A reference document for mentors and mentees

**Human Resources**  
LEARNING

25/07/2007

Copyright: Shell International Ltd 2006





## CONTENTS

<b>What is Mentoring?</b>	<b>4</b>
<b>The Mentor's Role</b>	<b>5</b>
<b>The Role of the Supervisor</b>	<b>5</b>
<b>The Mentee's Role</b>	<b>6</b>
<b>The Mentoring Process</b>	<b>7</b>
<b>Building Rapport</b>	<b>8</b>
-First Meeting Checklist	9
- Sample Agenda – First Meetings	10
<b>Setting Direction</b>	<b>11</b>
<b>Making Progress</b>	<b>12</b>
-Effective Meetings	13
<b>Moving On</b>	<b>15</b>
<b>Tips</b>	<b>17</b>
For Mentors	
For Mentees	
<b>Appendix A: Mentoring Agreement</b>	<b>16</b>
<b>Appendix B: Mentee Value &amp; What's Important</b>	<b>18</b>
<b>Appendix C: Stages in Mentoring Checklist</b>	<b>20</b>
<b>Appendix D: Tips for Mentors &amp; Mentees</b>	<b>21</b>

## WHAT IS MENTORING?

### **A Partnership**

Between two people built upon trust.

### **Confidential**

The mentor offers a safe environment to the mentee to discuss work-related issues and explore solutions to challenges.

### **Off-line**

Mentors are typically outside the mentee's immediate team, and not in their reporting line. This facilitates confidentiality as well as offering the mentee a fresh perspective in discussions.

### **Positive Developmental Activity**

The primary focus is the less tangible skills which enable individuals to operate effectively as leaders and achievers.

Mentors can offer insights into the ways the organisation works, how the informal networks operate and how they think about the challenges and opportunities mentees encounter.

Mentees provide the main drive behind the relationship and help set the direction to meet their development needs.

### **Self-reliance**

This is the aim of mentoring. Mentors are not there to sort out problems but rather to highlight the issues and to help plan ways through them. Through skilful questioning, they help clarify the mentee's perspective while bringing, an additional view to bear on the issues.

### **Understanding And Trust**

Sharing views and ideas builds this. Both mentors and mentees share a common benefit of developing a strong two-way learning relationship.

## THE MENTOR'S ROLE

No two mentoring relationships are alike. Yet the mentor's role is consistent. Since the aim of mentoring is to build the capability of the individual, mentors should respond to their needs in a way that enables them to find their own solutions.

Mentors are offering themselves as a resource to the mentees. Here are some of the resources most mentors will be able to offer:

<b>Organisational Experience</b>	understanding of the culture of the organisation - its values, its processes, its politics and the strategies required to negotiate them.
<b>Knowledge of People</b>	experience of working with and handling people in general, perhaps understanding of specific people with whom the mentee is interacting.
<b>Knowledge of Networks</b>	knowledge of networks that exist within the organisation and of networks that the mentee might need to relate to or develop for themselves.
<b>Knowledge of Career Options</b>	understanding of career paths and options within the organisation and how these are likely to develop in the future, plus possible direct experience of areas of work which are of interest to the person being mentored.
<b>Life Experience</b>	experience accumulated through the mentor's own life of personal issues that are or are likely to be of use to the person being mentored.
<b>Technical expertise</b>	job-related expertise - this might be technological or managerial. It is expertise that the mentee might find useful in their current or future roles.

This is not a definitive list. Nor should anyone feel that they have to provide all of the above, they are not prerequisites. The list is intended as a stimulus to help mentors reflect on their own resources and to consider which of these they want to make available to the people they are mentoring. But remember, good mentors keep out of the action - they look on, encouraging rather than taking over and doing the work. Mentors play the role of the objective supporter and provide an ideal sounding board.

### **An effective mentor:**

- is a good listener
- is actively interested in the individual and their development
- trusts others and can be trusted
- is encouraging and exhibits confidence in the individual
- is able to maintain the integrity of the relationship between the mentee and their manager.

## THE ROLE OF THE IMMEDIATE SUPERVISOR

A mentor will never take over from the line the prime role of developing the individual. Their function is to be a transitional figure at a key time in a person's development, whilst the role of the immediate supervisor is continuous with a focus on performance in the job and potential for advancement.

The supervisor is responsible for allocating tasks, defining objectives and setting priorities, monitoring performance and giving feedback, appraising and developing, training and remuneration

The supervisor is expected to support the mentoring program by understanding the program objectives and purpose and by allowing the mentee reasonable time out for mentoring sessions.

## THE MENTEE'S ROLE

Mentoring is designed primarily to benefit the mentee. However, what each person gets from the relationship will depend significantly on what they put into it. By accepting the role, the mentee assumes responsibility for driving the relationship. It is their responsibility to establish the goals and to manage the process to further their personal and professional growth.

In entering a mentoring relationship, mentees should:

- know what they want to achieve from the relationship
- clarify what is expected of them and what their expectations are of the mentor
- set realistic aims for what can be achieved through the learning partnership
- be committed to their own development

### **The effective mentee will:**

- Take responsibility for driving their own development
- Initiate the mentoring meetings and take an active role in the mentoring discussions
- Bring real situations, issues, development needs to the mentoring meetings
- Share experiences openly, think for themselves, challenge intelligently
- Be prepared to receive honest feedback
- Implement agreed actions and update the mentor on progress
- Complete a six monthly review of the mentoring meetings

## THE MENTORING PROCESS

Mentoring is about helping people progress their development. A mentoring relationship does not stand still. Most go through the following stages:

<b>Building rapport</b>	getting to know each other and agreeing the basis for working together
<b>Setting direction</b>	what are the issues to be tackled, what are the priorities?
<b>Making progress</b>	the action part with regular contact and activity
<b>Moving on</b>	when the purpose of the partnership has been achieved.

## Building Rapport

The first meeting provides the opportunity to build the personal rapport which is crucial to the success of the partnership. Come prepared to talk about expectations and hopes for the relationship, but more particularly to share some personal interests and anecdotes to establish common ground.

Here are some questions mentees can ask themselves prior to the first meeting.

- What are my strengths?
- What are my major needs?
- What are the most important things the mentor can help me with?
- What are my short-term job objectives?
- What are my long term career goals?
- What do I want from the mentoring experience?
- What might the mentor expect to get from the relationship?
- What do I expect to contribute to the mentoring process?
- How can I help the mentor help me?
- How will I know if the mentoring is working / not working?

Here are some preparatory questions for mentors.

- What can I offer someone I mentor?
- How do I visualise mentoring someone?
- What do I want from the experience?
  
- What kind of mentoring experiences (whether my mentor was a formal or informal one) or mentoring moments (when the person is not my mentor but shares experiences which influence my development) have been most helpful for me?
  
- What career experiences have helped me most in my own professional development? What are the important lessons learnt from these experiences? How relevant do I believe my experiences and professional learning will be to the development of my mentee?
  
- How much responsibility for the mentoring relationship should I carry? How much should the mentee carry?
- How will I know when the mentoring is working / not working?

Whilst the mentee will drive the relationship there are a number of issues requiring the agreement of both parties. It is worth sharing your expectations of mentoring to agree some groundrules for the relationship as in the checklist below.



**First Meeting Checklist** (see also **Mentoring Agreement** document Appendix A, previously called Statement of Understanding)

Are we clear about each other's expectations of:

- each other?
- the mentoring relationship?
- what we hope to learn from each other?

How closely do our expectations match?

Who will take primary responsibility, the mentor, the mentee or both together -for:

- deciding how often to meet
- setting the agenda for meetings?
- ensuring that meetings take place?
- organising where to meet, and for how long
- defining learning goals?
- initiating reviews of progress?

How formal or informal do we want our meetings to be?

What are the limits to the confidentiality of this relationship?

What are we prepared to tell others  
about the relationship?  
about our discussions?

Who do we need to tell, and how?

What responsibilities do we owe to others as a result of this relationship? (to line managers, peers, representatives of HR, partners)

How do we ensure the mentee's line manager is supportive?  
is there a clear distinction between the roles of mentor and line manager?  
if there are overlaps, how will these be managed?

When and how shall we check this relationship is "right" for both of us?  
How will we resolve concerns on either side?

### Sample Agenda – First Meetings

Need ideas for your first few meetings? Consider tackling the one or more of the following topics:

- Revisit and finalize the Mentoring Agreement. Agree to a timeframe for regularly revisiting the document.
- Set a calendar for future meetings
- Review your I-OPT reports and consider similarities, differences, how you will value and respect your differences and overcome challenges
- Discuss how to communicate
- Discuss how you will give feedback to each other
- Explore career goals/aspirations
- Discuss issues arising from Tips for Mentors/ Mentees sheet.
- Brainstorm unique upcoming opportunities for skills development.
- Review how your last meeting worked. Give feedback to the mentor.
- Set a timeframe for a personal check-in. Take time to build the personal relationship.
- Follow-up on action items from last meeting
- Verify progress against plan. Explore barriers/set-backs, alternative courses of action.
- Celebrate milestones/progress

## Setting Direction

Establish needs, set priorities and perhaps a time scale. This stage will be revisited as the relationship develops, trust is confirmed and the mentee feels free to set further goals.

Below is a generic approach which may help establish the issues and the priorities. Whilst it may sound rather formal, handled sympathetically a framework like this can help an individual sort through issues which have been blocking them

### *Clarify the individuals needs*

- what is the mentee's current situation?
- what is their vision, their aim?
- what are the barriers which could get in the way?

### *Explore the situation*

- what does the individual bring to the situation, what strengths and weaknesses?
- what supporting 'evidence' is there which the mentee can offer, views of others, performance reports, etc?
- what is the context? what is happening around the mentee? what are the issues in the mentees team?

### *Plan*

- goals,
- milestones,
- priorities

### *Check commitment and capability*

- now you have both established what is needed do you both feel able and willing to tackle it ?
- is the mentee prepared to act on the outcomes?
- Can the mentor commit to a certain number of meetings per year?

If you are struggling with creating an inspiring plan or approach, you may want to take a step back and have a look at Appendix B: Mentee Values and What's Important.

## Making Progress

This is the most productive of the stages, a period of sustained activity in which the relationship is regularly reviewed and adapted. Regular meetings at this stage can support a lot of learning.

### *Venue*

It is helpful to vary the location for meetings to match the particular need of each meeting, informal or private:- the office, the coffee area, a quiet room or off site.

### *Preparing for the meeting*

Whilst mentoring when it works well appears relaxed and natural, greatest benefit is achieved with preparation on both sides.

#### For the mentee

What are the issues?  
How do I feel about them?  
What do I want to tackle this time?  
Why do I want to tackle this now?  
What am I avoiding?  
What is important to me?

What data do I have?  
What examples would illustrate the issue?  
Is there useful documentation?

What outcomes do I want?  
What outcomes do I want to avoid?  
What do I want to say?

Where would I benefit from a different perspective?  
How specifically do I see the mentor helping?  
How am I going to make best use of the time together?

#### For the mentor

What kind of issues does the mentee want/need to address?  
Is he/she ready to address them yet?  
What issues remain from our last meeting?

What specific insights should I help the mentee acquire?  
How directive should I be?  
What models would be useful?  
What documentation would be useful?  
What contacts might be useful?

How have I helped so far?

How well have I handled the role so far?  
How should I pace the meeting?  
How should we end this next meeting?

What else could I do to help?

### *Frequency*

- At the start it useful to have more frequent meetings, perhaps every two weeks, to get to know each other and establish a direction for the relationship. After that the frequency will depend on a number of factors.
- geography and the schedules of the two individuals
- a year's relationship may require meeting at least monthly to achieve the plans in the time.
- ad hoc meetings, responding to events, are popular in theory but most people recognise the need for some regularity. Perhaps the easiest way is to book two or three meetings ahead at the end of a session.
- use e mail or telephone between meetings.

See also Appendix D, Tips for Mentors & Mentees

## Effective Meetings

There is no one process for conducting a mentoring session - each relationship, each session even, is likely to require a different process. Pairs should discuss this regularly as the relationship progresses, so that your meetings remain productive and appropriate.

Relationships flourish where both parties feel they are getting something from them, so whilst mentoring meetings are usually informal, they do need a sense of purpose. A simple meeting plan is set out below.

### Agree the purpose

In mentoring the mentee drives the agenda and mentors need to explore issues from the mentee's perspective.

### Clarify the issues

- stimulate exploration and analysis with probing questions
- broaden the context of the issue, think round the issue, bring in a different perspective
- challenge any underlying assumptions

### Explore options

### Focus the discussion

- pull thoughts together
- test the reality of the suggestions

### Confirm

- agree actions
- check the commitment to succeed
- build confidence if necessary

There is rarely a set agenda for a meeting, most work best where the mentee brings two or three significant topics to discuss, such as:

- issues that have arisen in the mentee's job which merit deeper discussion
- ideas to test out for the future
- corporate strategy or changes in the business

Here are a few one-liners which can be used by the mentor to stimulate the discussion:

What is your major challenge at the moment?

Since we last met -what has changed? what have you changed?

-what successes (or frustrations) have you had?

-what have you done to progress your plans?

What have you learnt about yourself/the business/the sector?

Compare and contrast two good leaders/innovators/thinkers/you have worked with.

How does your current role/team differ from the previous one?

-from a preferred one you have worked with?

How are you handling situations now compared with last year?

-compared with when this relationship started?

*At the close of the meeting, review the meeting's effectiveness.*

- relating the value of the session to the goals for the relationship
- confirming and committing to necessary follow up
- agreeing the next meeting date

What have I got out of this meeting?  
What am I going to do as a result?  
When should we meet again?  
What will have been achieved by then?  
  
How well did the meeting run?

Phone calls or e-mails in between meetings keep the relationship alive.

### **Moving On**

At some stage both mentor and mentee will recognise that they have largely achieved all the goals they set for the relationship. The mentor may have offered all they can to the relationship, a new stimulus is needed. It is probably appropriate to allow the relationship to end. Before separating it is timely to evaluate and generalise learning and to review what can be taken and used in other contexts. See Stages in Mentoring Checklist , Appendix C.

## Appendix A: Mentoring Agreement

The purpose of this document is to help establish some working guidelines for the Mentor/Mentee pair. The Agreement can serve as an agreement between the two of you. It is strictly confidential, intended solely for your use. Each Agreement will be unique reflecting the expectations and needs of the two parties involved.

It is suggested that as mentor or mentee you review it individually to identify how you would address the points below, then have a conversation to discuss how you want to work together and agree process and next steps. You can also decide whether you both want to formally sign this or just have an explicit agreement, using the content below, to guide how you are going to work together.

MENTOR	MENTEE
Name: _____	Name: _____
Mentor Company/Business Unit:	Mentee Company/Business Unit:
Preferred Mode of Communication: Face to face                  Email                  Phone	Preferred Mode of Communication Face to face                  Email                  Phone
How do you like to receive feedback?	How do you like to receive feedback?
<b>PARTNER AGREEMENTS</b>	
List your general expectations for this relationship.	
Frequency of contact?	
Frequency of face-to-face meetings?	
What will be the duration of the relationship?	



What is the specific purpose of this mentoring relationship? In other words, what is it we want to accomplish?

**Mentors**, complete this section. Be specific.

As your Mentor, I am agreeing to: (e.g., help with your development goals, give you feedback, respond to your requests within 24 hours, replace any meetings I cancel with another date etc)

**Mentees**, complete this section. Be specific.

As your Mentee, I am agreeing to: (e.g., give you feedback on mentoring skills, respect your time, be responsible for my own development, plan the agenda of each meeting in advance etc)

**Our Next Steps** are (include due dates): (e.g. identify next meeting date and agenda, time to review the Mentoring Agreement, review session date after 3 months etc).

Confidentiality Agreement:

We agree to the confidential nature of this document. If we choose to discuss its contents outside the pair, we will seek the permission of the other party beforehand.

At any point in time during this relationship, if we feel it is not working for both parties, and we are unsuccessful at resolving the issues, we can choose to end the mentoring relationship without negatively reflecting on either party.

Mentor Signature (optional):

Mentee Signature (optional):

Date Signed:

Date Signed:

## Appendix B: Mentee values and what's important

If you are struggling with creating an inspiring development plan, you may want to take a step back and revisit your personal "vision". Getting clarity about what is really important to you can help simplify your direction setting. You may decide to share some of your responses below with your mentor, if you wish.

Things I really enjoy doing (work and outside of work):

Things that bring me happiness/joy:

Two best moments of my past week:

Three things I'd like to do if I had a completely free choice:

Issues or causes I care deeply about:

My most important values (top 5):

Things I can do at the Good-to-Excellent Level:

What I'd like to stop doing or do as little as possible:

Themes that emerge from responses to the above

## Appendix C: Stages in Mentoring Checklist

Tick a column for each item to indicate your view about whether or not you have reached this stage in your relationship with your mentor

		Strongly Agree	Agree	Disagree	Strongly Disagree
<b>Build Rapport</b>					
1	We have established a good understanding of each other				
2	I feel relaxed in our meetings				
3	We understand and respect each other's feelings and opinions				
4	We respect the confidences we share				
5	I feel confident in the relationship				
<b>Set Direction</b>					
6	We have established clear goals for the relationship				
7	We have agreed the objectives, a broad route towards them and ways to measure progress				
8	We are beginning to surface differences of opinion and to work through them constructively				
9	The Mentee feels comfortable to challenge the mentor				
<b>Making Progress</b>					
10	The agenda for our meetings is being set increasingly by the Mentee				
11	Responsibility for managing the relationship is resting increasingly with the Mentee				
12	The balance of power in our relationship rests increasingly with the Mentee				
13	We have celebrated achievement of goals and milestones				
14	We have a positive, supportive, nurturing relationship				
15	The Mentee is much more confident to cope with new or demanding situations than when our relationship began				
<b>Closedown</b>					
16	We have largely achieved all the goals we set for our relationship				
17	The Mentee can now tackle most situations confidently without the mentor's help				
18	The Mentee feels they have reached self sufficiency				
19	We are in danger of becoming dependent on each other for advice and support				
20	We have become friends at a professional level				

## Appendix D: Tips for Mentors & Mentees

### Tips for Mentors

1. Maintain regular contact. Re-schedule meetings if you cancel them
2. Always be honest.
3. Avoid being judgmental.
4. Recognize that you have your own need for support. A Mentor may need a Mentor too!
5. Don't expect to have all the answers.
6. Help your Mentee access resources and further support.
7. Be clear about expectations and boundaries.
8. Stand back from the issues your Mentee raises but work together on them.
9. Respect confidentiality.
10. If the relationship falters - hang in there!

### Tips for Mentees

1. Accept challenge willingly.
2. Share with your Mentor how you feel about the way the relationship is working.
3. Maintain a positive view of yourself.
4. Be active in your own development.
5. Have faith and trust in your mentor.
6. Be willing to discuss issues openly.
7. Take a few risks in order to progress.
8. Think about other ways to develop yourself outside of your mentoring relationship.
9. Don't expect too much from your Mentor.
10. Talk about the end of your relationship when the time comes.