

Most successful people can point to one or more people that have been particularly important to their growth and development. These people are mentors.

Mentors can serve many purposes. Sometimes they will help an individual with immediate needs, helping them solve pressing problems, getting important information or learning a skill quickly. Other times it provides longer-term support and guidance. Regardless of the specific need being addressed, mentoring is a giving/receiving relationship for everyone involved. It is about helping each other to expand and grow so that everyone wins.

Use this guide to assist you with establishing and navigating through your mentoring relationship. For specific topics on mentoring, click on the titles below.

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## Mentoring Overview

### The Mentoring Approach at BBH

- At BBH Mentoring **IS**...
  - A partnership between a Mentee and a Mentor – providing both with opportunities to share talents, skills, experiences and expertise.
  - Focused on the growth and development objectives of the Mentee, supplementing learning experiences afforded through regular training and on-going coaching and feedback from managers.
  - A valuable – but optional – feature of a comprehensive approach to personal and professional development.
  - An investment of time, energy and thought from both the Mentee and the Mentor.
- Mentoring **IS NOT**...
  - Random – it is planned and structured. Forging an effective mentoring relationship involves one-on-one meetings, follow-up and on-going evaluation of progress toward meeting learning objectives.
  - Bound by the parameters of the Mentee's current job or role - although professional growth has a positive impact on an individual's current contribution, the focus of mentoring can be broader, enabling the Mentee to explore capabilities needed for future opportunities as well.
  - For everyone - the time invested in effective mentoring experiences is substantial and the readiness to commit to that investment is driven by a variety of factors including development needs and current responsibilities.
  - A program or a matching service. There is no database from which to find a specific Mentor or Mentee.

### The Benefits of Mentoring

- **Benefits to the Mentee:**
  - A more experienced or knowledgeable person to provide feedback and advice for his/her continued career and professional development.
  - A channel to brainstorm ideas, communicate concerns and receive support.
  - Insight into BBH culture and a broader perspective on the business.
  - A supportive forum to develop a focused plan for professional development that is tied to skills, knowledge, and actions.
- **Benefits to the Mentor:**
  - Opportunity to demonstrate commitment to developing people.
  - Personal satisfaction of guiding and sharing with another member of the firm.
  - Vehicle to keep "in touch" with issues and concerns in the firm.
  - Opportunity to use and develop leadership skills.
  - Enhanced and strengthened interpersonal and coaching skills.

## Mentoring Roles

|         |                                                                                                                                                                                                                                                                                                                                                                                                                             |
|---------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Mentee  | The mentee's role is to manage the mentoring partnership. Since the partnership is focused on the mentee's learning objectives, it is essential that potential mentees devote time to clarifying professional goals and identifying strengths that will promote the achievement of those goals and development areas that may be obstacles.                                                                                 |
| Mentor  | The mentor's role is to share experience, insights and feedback that will guide the mentor in the achievement of his or her learning objectives. Listening plays an important part in the mentoring role – listening to understand the mentee's goals and to uncover key learning opportunities that support those goals.                                                                                                   |
| Manager | Though not a direct partner in the mentoring partnership, the manager plays a key role as he/she manages the mentee's day-to-day contribution on the job, the manager can be a valuable resource during the mentoring experience. The manager provides feedback and input regarding progress and accomplishments AND supports the employee in his/her career development and encourages time and effort spent on mentoring. |
| BBH     | BBH's role is to provide tools & resources to support mentoring relationships.                                                                                                                                                                                                                                                                                                                                              |

## Mentoring Guidelines

- Mentoring partnerships should contribute to the department's business strategy and objectives.
- Mentors and mentees should not be in a direct reporting relationship.
- Mentoring partnerships are about professional development.
- Mentoring partnerships are grounded in confidentiality and trust.
- Mentoring partnerships should be dynamic and reciprocal experiences in which the mentor and mentee grow and learn from each other.
- The responsibility for identifying discussion topics, surfacing ideas and structuring the relationship is shared by both mentors and mentees.
- Although there is a defined period of time for mentoring partnerships, they can be extended by mutual consent.
- Mentoring is a volunteer activity. Either party can end the relationship for any reason at any time with no fault assigned.
- Mentees are encouraged to keep their managers informed about the mentoring partnership; however, the extent to which the manager is involved is at the mentee's discretion.
- The effectiveness of mentoring partnerships should be evaluated at defined intervals by reviewing the progress towards achieving the mentees' and mentors' objectives.
- The conversations between the mentee and mentor should remain confidential, unless otherwise specified upfront.

## Steps to Effective Mentoring

There are six steps in the BBH mentoring process. BBH provides tools, resources and information on each of the following steps to assist you in making your mentoring relationship a powerful learning experience.

- Step 1: Is Mentoring Right for You?
- Step 2: Getting Started
- Step 3: Pairing Up
- Step 4: Defining the Mentoring Relationship
- Step 5: Stay on Track
- Step 6: Wrap it Up

Mentoring is not a one-time event or a series of disconnected activities. Mentoring is a process that requires both the Mentee and Mentor to prepare and plan, clearly state objectives and expectations, and actively collaborate in making the relationship work.

### Step 1: Is Mentoring Right For You?

Mentoring is not for everyone. An effective mentoring experience requires time, effort and commitment from both the Mentee and the Mentor. Although mentoring can be a valuable part of one's development, there may be other activities that are more practical or appropriate for you.

*Complete the "Are You Ready to be a Mentee" or "Are You Ready to be a Mentor" worksheets to assess your readiness to enter a mentoring relationship.*

### Step 2: Getting Started

A great mentoring experience doesn't just happen - you make it happen. Start by establishing a solid foundation of self-knowledge, gain a clear focus, define your objectives, and find out the specific mentoring styles that are right for you. Whether a Mentee or Mentor, knowing yourself better will help you as you recruit the right mentoring partner and position yourself to get off to a good start.

The more specific you are in defining what you want to accomplish via a mentoring relationship, the more effectively your Mentor will be able to help you. Below are some ideas to get you started. Some may apply to you; others may not apply. Select up to three objectives that are most relevant and appropriate for you. If necessary, add in additional objectives of your own in the blank spaces provided. Once you have identified your objectives, restate them in your own words and make sure they are specific and actionable. Ask yourself how you will know when you have achieved your objective?

My objectives are to:

|                                                                           |                                                                    |                                                            |
|---------------------------------------------------------------------------|--------------------------------------------------------------------|------------------------------------------------------------|
| <input type="checkbox"/> Build my self confidence in giving presentations | <input type="checkbox"/> Expand sources of feedback                | <input type="checkbox"/> Increase my ability to take risks |
| <input type="checkbox"/> Expand my network of contacts                    | <input type="checkbox"/> Increase my understanding of the business | <input type="checkbox"/> Develop personal skills           |
| <input type="checkbox"/> Clarify my professional career goals             | <input type="checkbox"/> Develop my skills as a manager            | <input type="checkbox"/>                                   |
| <input type="checkbox"/> Learn new technical skills                       | <input type="checkbox"/> Develop my project management skills      | <input type="checkbox"/>                                   |
| <input type="checkbox"/>                                                  | <input type="checkbox"/>                                           | <input type="checkbox"/>                                   |

In addition, the questions below can help you sharpen your focus:

- What work assignments challenge you the most? Where do you feel stuck?
- What skills do you want to acquire? What experiences do you want to have?
- What career paths interest you? What changes will you have to make to pursue your interests?
- Who are your role models? Why did you select them?
- What is an untapped strength of yours that you'd like to see the organization take greater advantage of?
- Who is in your current network? What types of people would you like to add?
- What image do you want to project? How would it serve you?

## Step 3: Pairing Up

### Is There a Mentor Out There?

Mentors come in all shapes and sizes and can offer a wide variety of learning experiences. They may have many years with the firm or may have recently joined, bringing expertise from other groups or companies. You can also look for a Mentor outside the firm – professional organizations related to your industry, for example, are often good external sources for Mentors.

**Where do you look for Mentors?** Take a broad approach in your search for a Mentor. Look for Mentors...

- ....outside your function or department
- ....who are different from you and who could offer new perspectives
- ....who possess skills or competencies you lack or want to polish
- ....with reputations as continuous learners

### What should you look for in a Mentor?

As you search for a good match with a Mentor, look for people who can help you meet your objectives. Different types of Mentors exist, e.g.:

- 'Guide' Mentors are generally the people who have been with the firm for a while, know the history and are good at explaining how things evolved to become today's organization.
- Often 'Ally' Mentors are people who are known as development-focused managers.
- 'Catalyst' Mentors may have less tenure with the firm or may have moved around a lot – experiencing many different work environments, assignments and roles. Look for the experimenters – you'll usually find 'Catalyst' Mentors in that group.
- 'Advocate' Mentors may be members of senior leadership groups or individuals who have led high-profile project teams involving multiple functions or areas. The effective 'Advocate' Mentor has created and cultivated an extensive and/or influential network.

|                                                                                                                                                                                                                                                                                                             |                                                                                                                                                                                                                                                                                                                 |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <p><b>The 'Guide'...</b></p> <p><i>...will often tell a story in response to your question</i></p> <p><i>...will usually want to share experiences and history</i></p> <p><i>...will likely ask questions that make you stop and think</i></p>                                                              | <p><b>The 'Ally'...</b></p> <p><i>...will probably make you feel comfortable fairly quickly</i></p> <p><i>...may surprise you by giving very candid responses to your questions</i></p> <p><i>...will be responsive to a wide range of comments –</i></p>                                                       |
| <p><b>The 'Catalyst'...</b></p> <p><i>...will often offer a variety of ideas and will prompt you to share your thoughts</i></p> <p><i>...may seem to jump from topic to topic covering many different subjects</i></p> <p><i>...will often offer perspectives of the firm that seem novel or unique</i></p> | <p><b>The 'Advocate'...</b></p> <p><i>...will likely want to know about your career goals and aspirations</i></p> <p><i>...may want to talk about how your development fits into the firm's plans</i></p> <p><i>...may ask about your contact network and how you want to grow your circle of influence</i></p> |

## How do you determine if someone's a good match?

Once you identify a potential Mentor, set up an initial meeting. An open discussion with a potential Mentor is the best way to determine whether you are a good match. Once you have scheduled your meeting, review the following questions and select a few to ask the potential Mentor:

### *General questions*

- What interests you about a mentoring partnership?
- What do you believe are the keys to effective development?
- What are some areas in which you could help someone grow and learn?
- How would a mentoring partnership support your objectives?
- How might I be able to give back to you in exchange for your mentoring?

## Who's Out There to Mentor?

Mentoring others is an excellent way to accelerate learning, develop talent and build collaborative relationships. Typically there are more people seeking Mentors than there are Mentors available, so your interest in Mentoring is commendable. Know that your efforts are needed!

Review the following guidelines and select a few to discuss with potential Mentees.

- Tell me about your strengths. How do you leverage them in your current job or role?
- Tell me about your career so far. What's gone well and what has not gone so well?
- What are your development needs?
- Tell me about how you have grown and developed in the past year?
- What do you want or need from a Mentor?
- What experience(s) have you had with mentoring in the past?
- Describe your vision of an effective mentoring partnership.
- What could I learn from you?

### *Look for Mentees....*

- Outside your function or department.
- Who are different from you and to whom you could offer new perspectives.
- Who could develop skills & capabilities that are critical to the firm's future.
- With reputations as continuous learners.
- Who are committed to development – theirs and yours!

## Step 4: Defining the Mentoring Partnership

Like any partnership, a mentoring relationship is more likely to succeed if expectations and ground rules are agreed upon early in the relationship. The Mentoring Agreement provides the framework for establishing guidelines, commitments and objectives for the partnership from that day forward.

*It is highly recommended that a "Mentoring Agreement" worksheet be completed when kick-off a mentoring relationship.*

## Step 5: Stay on Track

Planning will keep your mentoring partnership on track and focused on your objectives. A thriving relationship depends on your investment of energy and your commitment to the experience. Below are tips and tools to help you identify action steps, plan meetings, and remain effective

### Plan Effective Meetings

Face to face meetings are essential. While you can certainly use e-mail, voice mail and many other methods of communicating to stay in touch, there is no substitute for face to face meetings at defined intervals. Make meeting commitments and stick to them. This is not to say you can't or shouldn't - have ad hoc meetings, but planning is important.

*Complete the following worksheets to ensure successful and meaningful mentoring meetings.*

- "Make the First Meeting Count – Mentee"
- "Make the First Meeting Count – Mentor"
- "Plan Effective Meetings"

### Identify Action Steps

Your objectives are more likely to be met if you have clear action steps. Mentors and Mentees should work together to develop action steps for each mentoring objective. Action steps should demonstrate how you will reach your objectives

*Complete the "Plan and Identify Action Steps" worksheet to help you clearly identify your objectives and the supporting action steps required to achieve your objectives.*

## Step 6: Wrap it Up

The end of the mentoring partnership is a natural part of the process and one from which you can learn a great deal. The transition does not mean the Mentee and Mentor will have no further contact – often former mentoring partners remain close colleagues and informal coaches. It just means that you have achieved the objectives of the relationship and no longer need to maintain the structure of a mentoring partnership

### Time to Wrap Up?

There are many factors that influence the length of time a mentoring relationship will last. Some partnerships remain in place for several years. Others accomplish the Mentee's objectives more quickly and end as a result. How do you know when it's time to wrap up?

- Have you accomplished what you set out to do?
- Are there additional learning opportunities you need or want to take advantage of?
- Is this mentoring relationship the best way to continue to focus on the Mentee's objectives as they have evolved?
- Would a different mentoring experience better serve the Mentee's needs?
- Are there other learning experiences that would be of more value at this time?

Talk about your answers to the questions above. As you know by now, a mentoring relationship requires time and effort from both the Mentee and the Mentor. It is important that time be invested wisely.

If you determine that there is value in continuing, arrange time to revisit the objectives you set to refresh and re-energize the partnership. If you determine that it is time to move on, read below for suggestions on how to get the most out of the wrap up of your mentoring partnership.

## How to Wrap Up

The end of a mentoring relationship is as much a part of the process as the preceding steps. There are a few things you can do to end on a positive note, maximize your learning from the experience, and celebrate your accomplishments.

Debrief the Experience - A part of your mentoring relationship has been focused on debriefing your learning assignments. The end of the relationship is an excellent opportunity to have a similar discussion about the experience as a whole. The following are some questions to think about and include in planning for your last meeting:

- How did the mentoring experience test you?
- How did the relationship evolve over time?
- What would you do differently?
- What surprised you? What disappointed you?
- How will you apply your learning?

## Farewell but Not Goodbye

The end of the mentoring partnership does not mean the end of the relationship. Former Mentees and Mentors are excellent resources to include in your network. As with any network connection, you need to make a point of staying in touch. For example, one particularly effective networking technique is to commit to calling one person from your network each month to check in and exchange updates. Some additional suggestions for continuing to stay connected with your mentoring partner include:

- Add your partner to an email follow up list that you use to distribute ideas and articles of interest
- Note your calendar to ask your partner to join you for lunch or coffee next month to touch base.
- Include your partner in an occasional organizational briefing about your area.
- Offer to participate in one another's brainstorming or problem solving sessions.
- Participate together in community projects (for example, those sponsored by the firm through BBHCares).

*Complete the "The End to a Mentoring Relationship" to help you reflect upon your mentoring experience and identify next steps to continue your development.*



## Individual Worksheets and Resources Available to Support A Mentoring Relationship

Individual worksheets are available in a Mentoring Workbook, accessible via CareerConnect.

| Title                                      | Purpose                                                                                                 |
|--------------------------------------------|---------------------------------------------------------------------------------------------------------|
| Are You Ready to be a Mentee?              | To evaluate readiness to engage in a mentoring relationship as a Mentee                                 |
| Are You Ready to be a Mentor?              | To evaluate readiness to engage in a mentoring relationship as a Mentor                                 |
| Mentoring Agreement                        | To establish a common understanding and expectations for a mentoring relationship                       |
| Making the First Meeting Count – Mentee    | To facilitate the first meeting in a mentoring relationship, from the Mentee's perspective              |
| Making the First Meeting Count – Mentor    | To facilitate the first meeting in a mentoring relationship, from the Mentor's perspective              |
| Plan Effective Meetings                    | To facilitate ongoing mentoring meetings                                                                |
| Identify Action Steps                      | To identify objectives and corresponding action steps                                                   |
| The End to a Mentoring Relationship        | To reflect upon the mentoring relationship and identify next steps for continuing with self-development |
| Beyond Listening and Learning (activities) | Ideas for how to benefit from the Mentoring relationship, from the Mentee's perspective                 |
| Beyond Teaching (activities)               | Ideas for how to benefit from the Mentoring relationship, from the Mentor's perspective                 |