

First 3 Meetings

Establishing a mentoring relationship



Triple Creek Associates
Creating World-Class Mentoring Cultures

Meeting 1 – Interview and Agreement

Goals:

- Establish the relationship and begin building trust.
- Define the general direction and expectations for the relationship.

Agenda:

- Relational Interview (20 minutes)
 - The Mentoring Agreement (30 minutes)
 - Agenda for Next Meeting (10 minutes)
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RELATIONAL INTERVIEW (20 minutes)

Use the following interview exercise as a way to get to know each other quickly. See how much you can find out about your mentoring partner in 6 minutes using the following questions.

Instructions:

Mentees will begin by interviewing the mentor. Feel free to ask follow up questions and clarifying questions, but do not spend more than about 2 minutes on each section. After 6 minutes, switch roles. After you both conduct your interviews, spend 5 to 8 minutes sharing what you learned about the other person that was interesting. Discuss any implications for your mentoring relationship.

Questions:

- Tell me briefly about your educational background and job experience.
- What is one area of expertise or experience that you feel might be helpful to me or to others?

What experiences contributed to your growth in that area?

In general, how do you learn best – hands on experimentation, watching others, or reading and reflection?

- Apart from your parents, who has had a significant, positive impact on your life?

When was this? How did this relationship impact you personally or professionally?

Describe what opportunities you would have missed without the influence of this person.

Notes:



THE MENTORING AGREEMENT (30 minutes)

In order to be effective, your mentoring relationship needs to support the following principles:

- **Collaboration** - Both you and your partner play a shared role in one another's development.
- **Respect** - Mutual appreciation of one another's talents and contributions is core.
- **Responsiveness** - As in any respectful collaboration, both you and your partner need to be sensitive and responsive to the goals, needs and perspectives of the other.
- **Confidentiality** - This supports the ability to speak candidly in difficult conversations.
- **Joint Accountability** - When you and your partner uphold agreements, this strengthens trust and helps keep the learning relationship focused and productive.
- **Free and Honest Expression** - You and your partner can share your strengths and weaknesses; your dreams and goals; and your past, present and anticipated experiences. Both of you can offer and hear feedback in the spirit of building on competencies and strengthening areas of weakness.
- **Focus** - The mentoring relationship needs to be clear in its purpose and goals. The mentoring agreement goals are the focus of learning and development.

A mentoring agreement is one way to establish these principles as the functional basis of your relationship. Spend a few minutes discussing each of the following areas of your mentoring agreement.

1. Goals

Goals are determined by the mentee, who identifies learning need areas. S/He looks at general competencies and learning descriptions, as well as any specific descriptions unique to the organization.

- What do we agree are the general goals and initial focus of our relationship?

2. Boundaries

Boundaries are placed on the relationship, highlighting those areas that the mentee is willing to share with the mentor and what issues the mentee would like to remain confidential.

- What things will we need to talk about? Is there anything that we should not discuss?
- What will we assume about confidentiality?

3. Accountability

Accountability represents the areas in which the mentee wants to be held responsible for successes and failures, as well as how information regarding performance will be passed on to the mentor.

- How can we both monitor progress?
- In what ways will we hold ourselves accountable?



4. Scheduling

Scheduling is the section of the agreement in which the mentee and mentor decide how long they think the relationship will last, as well as when and how frequently they will meet.

- How often will we meet?
- When and where?
- How will we handle if we need to reschedule?

5. Mentoring Level

The mentoring level depicts the level of interaction the mentee and mentor wish to have: Information, Skill or Advocacy.

- **Information Level** – At this level, mentees need information or understanding about aspects of their work life. Mentors perform three basic functions:
 - **Resourcing**: Provide information based on mentees' needs
 - **Advising**: Become reliable living sources of instruction by giving advice
 - **Enlightening**: Illustrate and bring understanding to mentees
- **Skill Level** – At this level, mentees need to develop specific skills. Mentors perform three basic functions:
 - **Teaching**: Instruct mentees in a specific skill development area using on-the-job teaching methods
 - **Coaching**: Provide first-hand feedback on current performance
 - **Modeling**: Become living examples of the skill area in development
- **Advocacy Level** – At this level, mentees need to focus on highly complex interpersonal behaviors. Mentors perform three basic functions:
 - **Guiding**: Navigate mentees through the personal development process
 - **Consulting**: Act as a sounding board and guide
 - **Sponsoring**: Advocate mentees' recognition and promotion

Questions to ask of yourself and your partner:

- Am I comfortable with this level of mentoring?
- Are we both comfortable with the roles that the mentor is being asked to play?

AGENDA FOR NEXT MEETING (10 minutes)

Look ahead to the next meeting and decide on a general agenda.



Meeting 2 – Clarifying Goals

Goals:

- Expand the relationship and continue building trust.
- Clarify the learning objectives and set preliminary goals.

Agenda:

- Relational Check-In (5-15 minutes)
 - Questions to Establish Initial Goals (20-30 minutes)
 - Agenda for Next Meeting (10 minutes)
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RELATIONAL CHECK-IN (5-15 minutes)

Use the following questions as a way to check in and learn more about each other.

- What happened since the last meeting that was energizing? Why was it so? Did anything happen that sapped your energy? Explain why.
- What do these experiences illustrate about my/your personality, work style, behavioral preferences—people-oriented or task-oriented, introvert or extrovert, etc.?
- Any questions that you feel we should add to our list to discuss at a future meeting?

Notes:

QUESTIONS TO ESTABLISH INITIAL GOALS (20-30 minutes)

Write down one general area that you want to develop in or learn as a result of your mentoring relationship:

The following questions can be used by you and your mentoring partner to clarify the general goal statements of the agreement and move you toward more specific action plans. Look over the following questions and decide on one or two relevant questions to discuss from each section that relate to your above general goal area. Talk about those questions and record any clarifying insights below each section.

1. Exploring Relevance to Mission, Larger Goals and Personal Development:

- What do you hope to achieve within the next 3-5 years?
- How does this goal fit with those hopes or dreams?
- How can you get paid for doing what you love?
- How does this development area tie in to your job description, strategic initiatives or personal development plan?
- What are some potential benefits of developing yourself in this area?
- Where does this development area fit into your priorities?
- Who might your development impact (e.g., your team, department, customers, stakeholders, organization, family)?
- What other areas of your work would be impacted if you were to improve your skills in this area?

Clarification and insight:



2. Exploring Specificity and Attainability:

- What have you done previously to develop yourself?
- What resources, people or otherwise, do you have access to that could help you in this development area (e.g., for frequent feedback or encouragement)?
- If you were to break this area down into skills and knowledge, what would be some of the most important aspects of what you want to learn?
- What forces are helping you move toward this goal?
- What forces are hindering achieving this goal?

Clarification and insight:

3. Exploring Measurability and Time Issues:

- What are your current skill and experience bases?
- What level of skill do you need in this area (e.g., familiarity, passing a certification, recognition as an exemplary performer, ability to train others)?
- To what degree are your goals capable of being measured?
- What concrete activities will you be able to do as a result of achieving your goals?
- When would you like to set the first progress check point and what should our evaluation criteria be?
- Is the timeline in our mentoring agreement reasonable for what you want to accomplish?

Clarification and insight:

Once you have discussed your chosen questions and recorded your insights, determine how this helps you clarify your general goal area. Write your clarified goal below. Make it as specific and measurable as possible, and list any specific outcomes or benefits from this development. Record any action items that you will work on in the next few months of your relationship.

Clarified Goal:

Action Items:

These questions offer a starting point to help foster dialog and make collaborating on the mentee's goals a rewarding experience. Review these questions often as part of your ongoing collaboration together.

AGENDA FOR NEXT MEETING (10 minutes)

Look ahead to the next meeting and decide on a general agenda.



Meeting 3 – Effective Dialog on Initial Issues

Goals:

- Expand the relationship and continue building trust
- Use an Effective Dialog worksheet to clearly discuss your mentoring question or issue

Agenda:

- Relational Check-In (5-15 minutes)
 - Dialog Model and Discussion of Learning Objectives (20-30 minutes)
 - Agenda for Next Meeting (10 minutes)
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RELATIONAL CHECK-IN (5-15 minutes)

Use the following questions as a way to check in and learn more about each other.

- What was the most productive discussion or dialog you had last week? Why was it so? What was the least productive? Explain why.
- What do these experiences tell you about your preferences for communication—simple, direct, room for explanation, time to reflect before speaking, logical, more personal, etc.?
- Are there any questions that you feel we should add to our list to discuss at a future meeting?

Notes:

Dialog Model and Discussion of Learning Objectives (20-30 minutes)

Briefly review and discuss the following material on effective dialog and use the accompanying worksheet to clarify any contextual issues that would help you discuss one question, issue, dilemma or decision related to your mentoring goals.



MEETING PREPARATION - EFFECTIVE DIALOG

Mentoring is largely about discovering new understandings, changing perspectives, and acquiring abilities from the life experience of another. Building a free flow of dialog is essential to this type of learning activity. The key to having open and profound learning for both mentees and mentors is effective dialog skills that use questions to unlock the dreams and potential of people. Thoughtful dialog can make people more aware of their strengths, dreams, goals, opportunities, next steps and unexplored potential.

To have an effective dialogue, the mentoring pair should briefly prepare of any known questions or issues that are to be discussed. An excellent model for thinking about communication effectiveness is the four speech territories: Examples, Assumptions, Actions, and Outcomes. Dalmar Fisher, David Rooke, and Bill Torbert first put forth these four areas in their book *Personal and Organisational Transformations through Action Inquiry* (2000, Varsitybooks.com). The following is a simplification and adaptation of the general concept of understanding or exploring an issue or question within its context, before deciding on action steps.

For example, suppose a mentee begins a conversation with the following statement and question:

“People I am supervising seem to be interpreting my comments and suggestions as criticism. What should I do?”

Honestly, there is not enough context and information for the mentor to give an intelligent response. Most people would instinctively respond with one or more of these follow-up questions to gain a better understand before offering advice or direction:

Examples:

- What is a past example of the current situation or a story that clarifies the issue?
- What are some events that led up to this situation?

Assumptions:

- What options are available to you?
- What were you hoping to accomplish when you started this?

Actions:

- What have you tried so far to understand or address the issue?
- Has this happened before? Tell me the story.

Outcomes:

- What would you like me to do for you?
- How can I help you clarify the issue or response?

In short, the mentor is saying: “I need to better understand the context of your question and the purpose of our discussion.”

The following worksheet is way for mentoring partners to do a 5 minute preparation for a mentoring discussion, thinking ahead of time what they need to explain to their mentor to be helpful in the discussion. It is also useful for either party to reflect on these questions during a conversation, to stimulate needed follow up questions before advice is given or decisions are made.



EFFECTIVE DIALOG WORKSHEET

Use the following questions to do a 5 minute preparation for dialog and ask follow up questions during the dialog to make sure a good understanding is reached before advice is given or action is taken.

What is the issue, situation, dilemma, goal or decision that you want to discuss:

Examples

- What is a past example of the current situation or a story that clarifies the issue?
- Who or what are the key factors influencing this issue?
- What are some events that led up to this situation?

Assumptions

- What dilemma does this pose for you? What choices do you have to make?
- What are your initial thoughts or opinions about what the underlying issues might be?
- What were you hoping to accomplish when you started this?
- What assumptions are you making in this situation? About yourself? About others? About the outcomes?

Actions

- What have you tried so far to understand or address the issue? What happened and what have you learned from it so far?
- What are your feelings about the decision, issue or situation?
- What are your initial proposals for actions or options to pursue?

Outcomes

- What kind of help do you need:
 - Clarifying the issue?
 - Deciding possible options?
 - Clarifying values and motives?
 - Reaching a final decision?
- What would you like me to do for you today?

Following the dialog:

- What resources would you need to further explore or address this issue?
- What actions or choices could you make to get started on a resolution?
- What changes do you need to consider?



AGENDA FOR NEXT MEETING (10 minutes)

Look ahead to the next meeting and decide on a general agenda.

This concludes the first three meeting agendas.

General suggestions for future meetings:

1. Use a simple agenda that includes a brief relational check-in and a focus on one central goal for the meeting.
2. Keep a running list of questions and issues to discuss.
3. At the conclusion of each meeting, decide what central issue you are going to focus on at the next meeting. This may change according to needs that arise unexpectedly, but it gives you a way to come to each meeting prepared.
4. Periodically review your goals and make sure you are both in agreement as to the general progress and direction for the relationship. (We have provided extra copies of the questions exercise and the Dialog exercise to help you clarify goals and to make dialog more effective in future meetings.)
5. If relational issues arise, go back over the mentoring agreement to see if a simple reaffirmation of your agreement and discussion of goals and boundaries are enough to refocus, redirect or reenergize the relationship.
6. Keep things both fun and focused. Don't force meetings to go beyond what is being productive. While longer meetings may be helpful at the beginning to get things started, many find scheduling half-hour meetings with a soft close more effective and efficient as the relationship progresses. The key is staying focused on one major goal and coming prepared for dialog and discussion.

THE FOLLOWING PAGES CONTAIN REPRODUCIBLE RESOURCES YOU MAY WANT TO PRINT OUT AND BRING WITH YOU TO MENTORING MEETINGS.



MENTORING QUESTIONS

Write down one general area that you want to develop or learn as a result of your mentoring relationship:

1. Exploring Relevance to Mission, Larger Goals and Personal Development:

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- What other areas of your work would be impacted if you were to improve your skills in this area?

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3. Exploring Measurability and Time Issues:

- What are your current skill and experience bases?
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Once you have discussed your chosen questions and recorded your insights, determine how this helps you clarify your general goal area. Write your clarified goal below. Make it as specific and measurable as possible, and list any specific outcomes or benefits from this development. Record any action items that you will work on in the next few months of your relationship.

Clarified Goal:

Action Items:



EFFECTIVE DIALOG WORKSHEET

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Actions

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POSSIBLE MENTORING ACTIVITIES

Look over this list periodically as preparation for your mentoring meeting or bring the list with you to brainstorm on the spot about possible activities to explore or synthesize knowledge.

Simple activities:
(Identifying Sources)

- Observe others and take notes
- Attend lectures
- Listen to tapes
- View and discuss a movie with leadership themes
- Read, journal and discuss observations
- Interview others and discuss observations
- Brainstorm
- Role-play

More complex activities:
(Gathering Activities/ Refining Results)

- Job shadow
- Attend an event, training or workshop together
- Review case studies
- Create decision worksheets
- Complete a force field analysis
- Conduct a gap analysis
- Share a story with one another that illustrates a personal experience and issue; debrief
- Debate opposing viewpoints
- Pretend the question raised by the mentee came from a third party; the mentee and mentor collaborate on the advice they would give that person
- Practice presentations, followed by a review and discussion
- Observe a real presentation and have the mentee do a self-evaluation

Complex integrative activities:
(Refining Results/Contextualizing Understanding)

- Create study and improvement plans
- Break down complex activities into steps
- List the unwritten rules of your organization or your unit
- Produce a personal job aid
- Request the mentee evaluate a paper or presentation authored by the mentor
- Conduct a self-evaluation of specific performance and suggest plans for improvement
- Draft a training manual outline
- Conduct interviews and synthesize conclusions
- Create joint projects or presentations
- Mentor others
- Train others with evaluation from the mentor
- Present a 2 - 3 year personal development plan

Knowledge Acquisition

