



**Sample TIPS Mentoring/Delegation Worksheet**  
**TIPS: Task/Timeframe, Information, Process, and Status**

Current Date: \_\_\_\_\_

Area of Mentorship/Delegated Task: \_\_\_\_\_

T: Task and Timeframe: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

I: Information and Resources to accomplish Task: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

P: Process and Performance: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

S: Status: Informal conversations, emails, phone calls for clarification, direction, problem resolution, etc. \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Formal Next Meeting and Expected Accomplishments: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_





## **NOT ANOTHER FORM, please! Why another form??**

The documentation of mentorship ties in with the documentation for delegation and a performance appraisal/review. Leadership, those I mentored and, even I, have questioned the need for yet another form in the organization whether the form is a database form, Excel spreadsheet, Word document, Web form or written on a napkin. However, over time the TIPS worksheet I created and used for my mentoring programs, supervisory delegation, and performance management proved helpful and necessary. I made the form easy and timely to document success for those who achieved and to help eliminate those that were less than successful in the program. Eventually, I created an Access database to track the information on the form.

Using the TIPS worksheet as a guide you should can customize the form for you; however, simplicity, being concise and ease-of-use is paramount for the mentor and mentee or delegator to delegated person to use the form. Most of my clients are creative and develop their own form, but these elements are essential.

Here is a brief explanation that the TIPS worksheet should contain:

**T: Task and Timeframe.** Task and timeframe is a brief description of the task and when the task should complete. For example, John is to learn the ordering system and the codes used for ordering the equipment and services necessary by a due date. The task should complete by May 30, 2015.

**I: Information and resources.** The information and resources are the systems, manuals, and people that help the mentee learn the organization, gain the skills, and acquire knowledge to complete the task. For example, John has the Ordering and Implementation manual and online resources at OurCompany.com to help in learning the task of knowing the ordering system and the correct codes to use. John is to meet with sales personnel and ordering personnel to understand the proper codes, installation intervals, and systems necessary to complete the order. I, as the mentor or supervisor, am available to assist and direct John along the way.

**P: Process and performance.** These list the manuals, systems, and other items from the Information and resources section and evaluates the mentor on proving the acquired skills. For example, John is to use the Methods and Procedures online manual, ordering/implementation manual for the correct codes and ordering process and the supporting systems. When John can independently produce an order with correct codes and



dates, he has proven his performance. I, the mentor, will monitor his initial order process and coach him. At the next meeting, he is to complete the order and process without intervention.

**S: Status** – Retain emails and briefly document conversations and phone calls that the mentee or delegated person sends and your response. The person should not ask the same questions repeatedly and should become independent quickly. Repeated questions and failure to act on responses and action items should be documented and affect the person’s performance and participation in the program and employment. While this is the informal process, the formal process of an established follow-up session and expectations is the formal process and accomplished at the first meeting and subsequent meetings. For example, John and I will meet three weeks from today, June 20, 2015 at 3:00 for an hour to review his achievements, obstacles, and challenges to learning the ordering process. John is to demonstrate that he can issue a simple order without intervention and I will begin coaching him through the complex ordering process, which he will need to accomplish independently on July 10, 2015.