



International Mentoring Day
27 October 2017
Breakfast Meeting



International Mentoring Day

1) Introduction

Dave O'Shea

1) Mentoring Guidelines

Sheelagh Malin

1) Panel Discussion

chaired by Dave O'Shea

Sheelagh Malin

Jerry Murphy

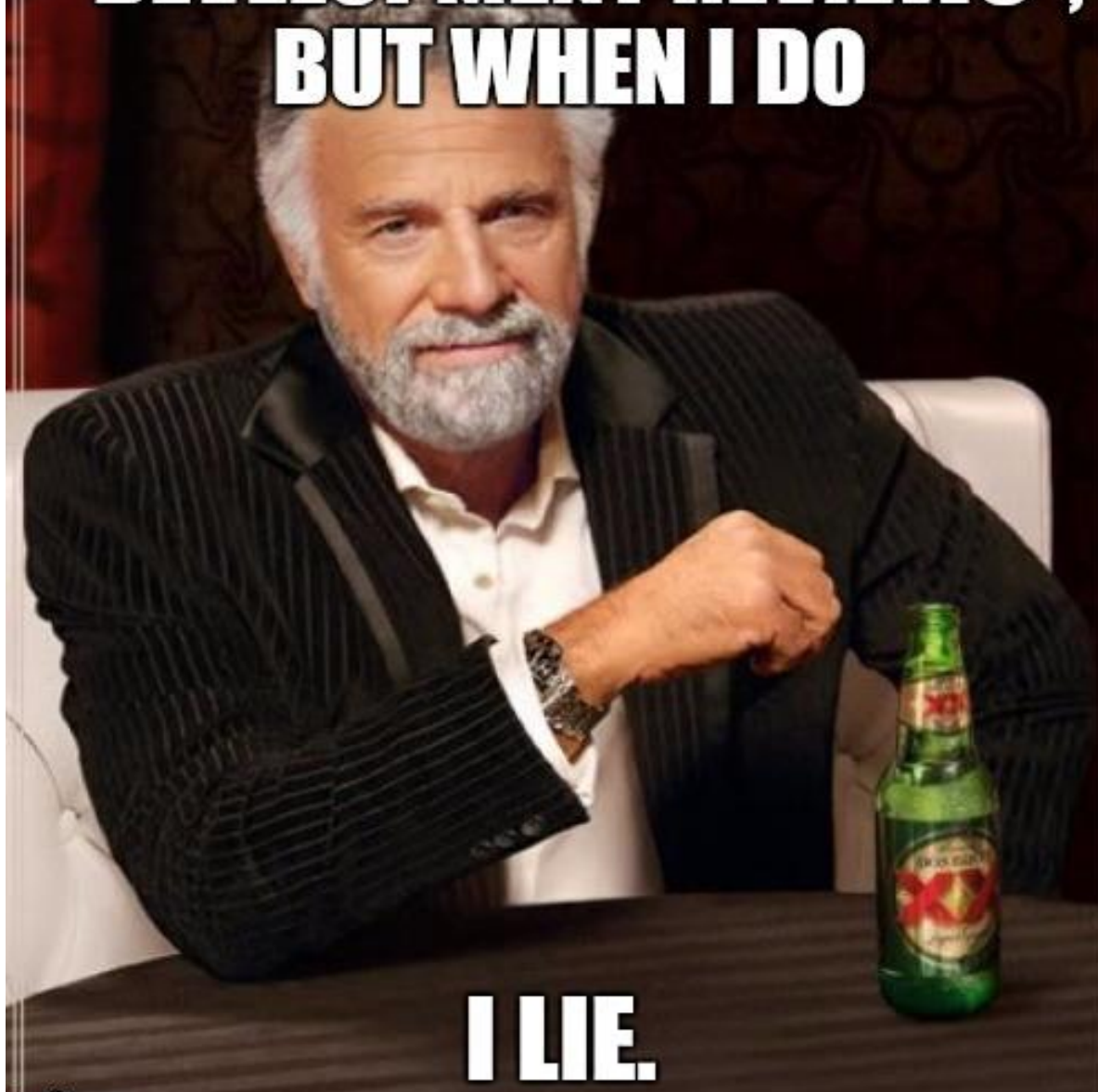
Paul O'Faherty



SAI mentoring Programme - History

- Initially an initiative for recent qualifiers
 - Led by RQ committee
- Paired senior member with RQ
- Pitched each year at Graduation Programme
- Only open to attendees at that programme
 - i.e. Members who qualified in last 12-18 months
- Fill an exam sized hole in life
 - Post exams – how build career/progress

**I DON'T ALWAYS HAVE
"DEVELOPMENT REVIEWS",
BUT WHEN I DO**



I LIE.



Outcome

- Great engagement from senior members and RQs
- Typically established 20-25 mentor/mentee relationships each year
- Feedback:
 - Great initiative
 - May be *too soon* after qualification
 - Did we offer such services for other members?

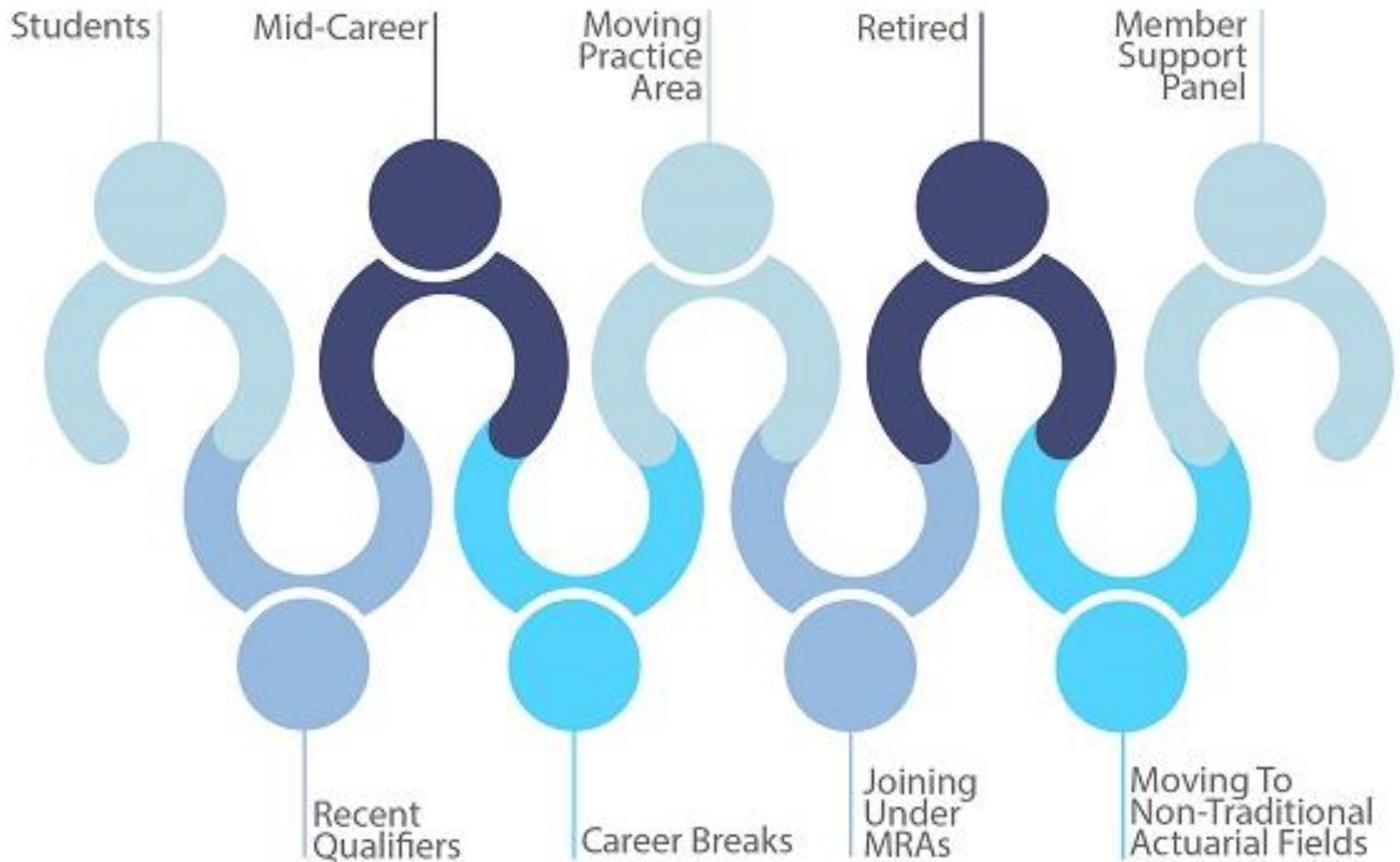


Expansion

- Enquiries to SAI offices
 - Not necessarily about mentoring, but cases where mentoring would help
- Examples included:
 - Returning after a career break
 - Changing practice area
- Indicated a demand for a broader mentoring programme
- Led to initiative undertaken by MEC



Member Support Service





Mentoring Guidelines

- Definitions
- Qualities of a good mentor / mentee
- Managing the relationship
- A few coaching tips
- Some “what ifs”
- IMI resources



Definitions

A **partnership** based on **trust** where a person has **space and a safe environment** to discuss their **own personal or professional development** and **explore** solutions to challenges.



More Definitions

Off-line help by one person to another in making significant transitions in knowledge, work or thinking.

Mentoring in Action, 1995, Megginson & Clutterbuck

Helping people with the quality of their thinking on things that really matter to them.

David Clutterbuck interview (see IMI resources)



Qualities of a Good Mentor

- Listening
- Curiosity
- Non-judgmental
- Discretion
- Willing to share knowledge and experience
- Positive focus
- Non-directive
- Supportive



Coaching / Mentoring Spectrum



Source: Adapted from Miles Downey



Society of Actuaries Mentoring Scheme

- Act as an objective adviser; loyal, interested and trustworthy
- Provide guidance that is designed to build confidence
- Be honest and encourage the mentee to work out their own solution wherever possible
- Be committed to the mentoring programme - devote the necessary time to meet regularly
- Keep all issues discussed confidential



Qualities of a Good Mentor

- Listening
- Curiosity
- Non-judgmental
- Discretion
- Willing to share ambitions and concerns ~~knowledge and experience~~
- Positive focus
- Open to change / new ways of thinking ~~Non-directive~~
- Takes ownership of their development ~~Supportive~~



The Mentoring Relationship



K.Spear

"I'd like to mentor you. We can start by you getting me some coffee."



Introductory Meeting

Getting to know each other

- Mentor and mentee share relevant background
- What is mentee's current situation
- What are mentee's objectives now
- What do they see as their current challenges
- What do they hope to gain from the mentoring relationship



Introductory Meeting

Designing the Relationship

- Where?
- How?
- When?
- What?
- Communication between meetings
- Expected duration / review points
- Confidentiality



Maintaining Focus

Not just a friendly chat!

- Suggested structure
 - Changes since last meeting / outcome of any actions
 - Agree on goal / topic for this meeting
 - Clarify / explore the context / options available / past experiences
 - Recap / summarise
 - Actions / next steps
- Feedback - how useful was the discussion?
- When will we meet next?



Reflecting on Progress

- Agree review points in advance
- What progress has mentee made towards overall objective?
- What further progress is envisaged?
- How is the relationship working for mentor / mentee?
- Do we need to make any changes to the relationship?



Reflecting on Progress

- Indicators for ending the relationship
 - end of agreed duration
 - mentee has achieved objective or is clear on the pathway
 - relationship is strained / not meeting expectations
 - practical reasons





A few coaching tips...

- Active Listening



- Give full attention
- Ask clarifying questions
- Repeat back what you're hearing
- Notice the non-verbal and articulate it
- Empathise when appropriate



A few coaching tips...

Be careful of the question “Why”



- It feels like a request to justify
- It can elicit excuses and cause defensive behaviour
- It can trigger an emotional response



A few coaching tips...

- Some alternatives
 - Can you tell me a bit more about ...
 - What else? (and what else?, and what else?)
 - What has led to this situation?
 - What is important to you about this?
 - What is stopping you from...?





A few coaching tips...



- Exploring the issue / options
 - What is the reality now?
 - What has worked well for you previously?
 - What other options are available? (and another, and another)
 - What is the evidence for that?



A few coaching tips...

- Silence



DeelComments.com

Gives time and space for further thoughts to be shared,
once trust has been established



A few coaching tips...

- Sharing the mentor's experience..

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..but without
directing or
telling

“If you follow my rules, you will never lose money. Rule #1: Never lose money.”



A few coaching tips...

- Agreeing actions
 - What one small step could you take now?
 - What else? (and what else?, and what else?)





A few coaching tips...

- Testing the commitment
 - How important is this for you right now?
 - When will you start and finish each action?
 - What support will you need?
 - What could hinder you and how will you deal with that?





A few coaching tips...

- Expanding efforts further
 - What would someone who is really good at this do?
 - What if you set yourself a higher target?





Some “what if?” scenarios

- Concerns about the mentee’s well-being
 - Excessive stress / mental health / capacity to manage self
 - Encourage mentee to seek qualified support (e.g. through Employee Assistance Programme)
 - Put mentoring on hold, but follow up to ensure they are getting help



Some “what if?” scenarios

- **When to breach Confidentiality**
 - Serious professional or ethical issues / risk of harm to mentee or others
 - Encourage mentee to report or seek their consent
 - Refer to Code of Conduct or seek advice if you are unsure



IMI Resources

- Top tips for mentoring

<https://app.goodpractice.net/#/imi-management-guides/s/70b0a3f0>

- Top tips for being mentored

<https://app.goodpractice.net/#/imi-management-guides/s/7b6c4c04>

- David Clutterbuck interview on mentoring skills

<https://app.goodpractice.net/#/imi-management-guides/s/09b8b244>

- GROW model

<https://app.goodpractice.net/#/imi-management-guides/s/372a6d89>

- Reviewing the coaching/mentoring relationship

<https://app.goodpractice.net/#/imi-management-guides/s/0d5d3b64>



Conclusion

What is the key to a successful mentoring relationship?

Well, the first thing is that people have got to develop **rapport and trust**, and trust is the biggest part of rapport. They have got to share the **same expectations of what the relationship is about** and that doesn't mean having the same goals...

So this openness and trust, a sense of purpose and a willingness to experiment and explore together. When you have got those things your relationship normally delivers a lot of value.

David Clutterbuck interview (see IMI resources)



Panel Discussion

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