



## MENTORING

Mentoring facilitates a process where an experienced actuary can provide advice and guidance in respect of career development, choices or career/ professional related issues. The process can be summarised as follows:

### Mentoring Process

#### 1. Introduction

- Following application to the Society an introduction is made by via email. Following this, the mentor contacts the mentee to arrange an initial call. The mentor can advise that this call will allow them to understand the needs of the mentee and help them to plan.

#### 2. Initial Call

- An initial exploratory call is recommended, to establish that chemistry is good and to get a good understanding of the needs of the mentee.
- The mentor can use this call to provide some actions in advance of a meeting. For example, they can ask the mentee to document their goals and expectations, draw up a plan, engage in some research, review the Society's competency wheel etc.
- The mentor can choose to opt out after the initial call.

#### 3. Meeting (in person or via web)

- Following the initial call, the first meeting will allow the mentor to review any assignment they may have given, and to engage in meaningful discussion and address any concerns the mentee may have.
- By the end of this meeting, the mentee should have clear and tangible actions which they can take.

#### 4. Follow Up Meeting(s) (in person or via web).

- The mentor can place the onus on the mentee to schedule a follow up meeting should they so require. Further follow up meetings may then be scheduled as required.

### Mentoring Methods and Models

Mentoring is not the same as coaching, and generally involves the mentor providing advice and sharing personal experience. It can be helpful to consider mentoring through some proven methods and models.



## Adopting a Personal Style - Active Listening and Encouragement

At the end of the day, a mentor and a mentee need to find a style that works for the mentoring conversation to be open and honest. Applying Active Listening techniques<sup>1</sup> are key to being a good mentor. It helps to build rapport between a mentor and a mentee. As a mentor, you may find it helpful to develop your own approach and communicate it with your mentee(s) to fit the style for the situation and the personalities involved. The illustration below may be of help.



### Explore/ Understand/ Action

A simple model from (Alred et al1) to help with mentoring looks at:

- exploration – to explore issues which are identified by the mentored individual
- new understanding
- action planning

<sup>1</sup> (2020) – *Active Listening: Skills You Need* <<https://www.skillsyouneed.com/ips/active-listening.html>>



### Exploration

Strategies	Methods
Take the lead	Listen
Pay attention to relationship and develop it	Ask open questions
Clarify the aims and objectives of mentoring	Negotiate an agenda
Support and counsel	

### New understanding

Strategies	Methods
Support and counsel	Listen and challenge
Give constructive feedback	Ask open and closed questions
Coach and demonstrate skills	Recognise strengths and weaknesses
	Establish priorities
	Identify developmental needs
	Give information and advice
	Share experience and tell stories

### Action planning

Strategies	Methods
Examine options for action and their consequences	Encourage new and creative way of thinking
Attend to the mentoring process and the relationship	Help to make decision and solve problems
Negotiate an action plan	Agree action plans



## GROW MODEL

Another long established model that comes recommended by the CIPD (*Chartered Institute of Personnel and Development*) and others is the '[GROW](#)'<sup>2 3</sup> model, originally developed in the 1980s by business coaches Graham Alexander, Alan Fine, and John Whitmore.

GROW stands for:

- Goal
- Current Reality
- Options (or Obstacles)
- Will (or Way Forward)



**GROW** (Whitmore 1993)

<sup>2</sup> (2020) *Approaches to coaching and mentoring: Vitae* <<https://www.vitae.ac.uk/doing-research/leadership-development-for-principal-investigators-pis/developing-individual-researchers/mentoring-and-coaching-researchers/mentoring-and-coaching-skills-for-pis>>

(2020) - *The GROW Model of Coaching and Mentoring A Simple Process for Developing Your People*: MindTools <[https://www.mindtools.com/pages/article/newLDR\\_89.htm](https://www.mindtools.com/pages/article/newLDR_89.htm)>

<sup>3</sup> (2020) - *The GROW Model - The practical coaching model driven by a powerful coaching philosophy*: Performance Consultants / John Whitmore <<https://www.performanceconsultants.com/grow-model>>



## GROW – Assisting a Non-Directional Mentoring Approach

Strategies	Methods
<b>1. Goal: <i>What do you want?</i></b>	<ul style="list-style-type: none"> <li>▪ What do you want to work on (achieve)?</li> <li>▪ What do you really want to be the outcome?</li> <li>▪ When do you want to achieve it by?</li> </ul>
<b>2. Reality: <i>Where are you now?</i></b>	<ul style="list-style-type: none"> <li>▪ What is happening now? (What, when, where, how much)</li> <li>▪ Who is involved?</li> <li>▪ What have you done about this so far?</li> <li>▪ What has been the effect of what you have done so far?</li> </ul>
<b>3. Options: <i>What could you do?</i></b>	<ul style="list-style-type: none"> <li>▪ What options do you have?</li> <li>▪ Obstacles? In what other ways could you approach this?</li> <li>▪ Benefits and costs of each option?</li> <li>▪ Weighing up each of the options?</li> <li>▪ Option Generation: What else?</li> </ul>
<b>4. Will: <i>What will you do?</i></b>	<ul style="list-style-type: none"> <li>▪ So, what will you do now, and when? What else will you do?</li> <li>▪ What could stop you moving forward? How will you overcome this?</li> <li>▪ Keeping motivated to succeed?</li> <li>▪ Review and milestones?</li> <li>▪ What does success look like?</li> </ul>

### Mentoring and the SAI Competency Framework

Actuaries may find the [SAI Competency Framework](#) and associated [resources](#) may prove to be helpful if planning medium term development activities to support the delivery of outcomes identified from a mentoring conversation.