

# Mentoring Guidelines

If you're new to mentoring, these guidelines will help you approach your first client engagement with confidence.

## Before the first meeting

Before investing time and travel in a face-to-face meeting, mentor and client should have a telephone or email conversation to make sure that expectations on each side are reasonable and attuned. Also, if the client thinks it appropriate and confidentiality is not an issue, it may save time if they send the mentor any useful material ahead of the meeting: accounts, business plan, web site link and so on.

## Location of meetings

The location should be comfortable, quiet and private, with refreshment available. Mentoring is best done away from the client's workplace, to avoid distraction by colleagues, phones etc, and to afford the client a sense of distance from the immediate pressures of work. The mentor's home may be appropriate, provided that the mentor too is free of distractions. Alternatively, many large hotels can offer a reasonably private corner in their public areas.

It is possible to mentor via telephone or email: however this form of mentoring is not as effective as face-to-face meetings and is best kept for ad hoc sessions that might arise between meetings.

## The first meeting

The first meeting allows both parties to decide whether the engagement will continue, and, if so, upon what terms. Neither party is committed to continuing the engagement until after the first meeting. The only commitment at the first meeting is mutual confidentiality.

At the first meeting:

- The mentor describes their background and experience.
- The client describes their background and experience.
- The client describes their current situation, says what motivated them to use mentoring, and says what issues they would like to address.
- The mentor describes their approach to mentoring in the context of the client's needs.

Whilst it is understood that the engagement might not proceed, it is sensible to discuss the following items on the assumption that it will:

- Duration of meetings. An hour is the minimum useful duration. Anywhere between 90 minutes and two hours is ideal.
- To ensure continuity, the date of the next meeting should always be set at the current meeting. The frequency of meetings may be anything between weekly and monthly as need dictates.
- The term of the engagement. This is typically six months, renewable by mutual consent.
- Additional support that the mentor is prepared to offer between meetings, such as phone or email conversations.
- Preparing for meetings. It may be useful for the client to write a short email a day or so in advance of meetings, saying what they have or have not accomplished since the last meeting, any new issues that have arisen, and what they would like to discuss at the next meeting.
- Concluding meetings. It is useful to conclude with the client reviewing the main points covered, action items and issues that need more work, and commenting on the value of the meeting.
- All exchanges within the mentoring relationship should be considered confidential by both parties.

- The mentor should ask the client to sign an engagement letter in the form provided on the ITC mentoring web site. The client is given two copies, one already signed by the mentor. The client will sign and return the second copy if the engagement proceeds.

## Commitment

Following the first meeting, the parties should confirm with each other that they wish the engagement will continue. Email or a brief telephone conversation will suffice.

The client's signed copy of the engagement letter should be returned to the mentor prior to or at the start of the second meeting.

## Mentoring at the first meeting

If there is good reason to do so (for example, if mentor and client are some distance apart) it may be appropriate to begin mentoring proper at the first meeting. If so, it is still important for each party to commit to the engagement and for the client to sign the engagement letter.

## Mentoring style

The mentor's role is to use their experience and maturity to assist the client to gain a more rounded perspective of issues, choices and decisions that they have to take, while also being conscious of their personal circumstances, abilities and challenges.

Business mentoring works in the space between consulting at one extreme and life coaching at the other. Mentoring is most effective when it is non-directive: in other words, when the mentor uses open questions (simplistically, those requiring answers other than 'yes' or 'no') to encourage the client to think creatively and to form their own conclusions. However, experience is part of a mentors' value, and there will be occasions when the mentor directly imparts information, opinion and experience.

Mentors may put structure into meetings via the GROW method, described by Sir John Whitmore in his book "Coaching for Performance":

- What are the client's **G**oals?
- What is the **R**eality of the client's situation?
- What are the client's **O**ptions?
- What **W**ill the client do?

A good mentor:

- Asks open questions.
- Understands and follows the client's agenda, not their own.
- Talks less than the client.
- Challenges the client to think beyond immediate day-to-day issues.
- Encourages the client to achieve specific goals via route maps and milestones.
- Is available to the client in times of stress when their value is greatest.
- Takes notes and maintains them in safe-keeping in case of subsequent misunderstandings.
- Sticks to agreed meeting times.
- Does not assume that their own experience is relevant to the client.
- Does not criticise, but asks tough questions and re-frames issues with alternatives.

Finally, from a legal liability perspective, the mentor should not provide consultancy or professional advice, and should ensure that no communication with the client, written or verbal, and nothing in their notes could be construed as such. The mentor should conform with and not depart from the provisions of the engagement letter containing the Mentoring Terms and Conditions.

**Beyond Pro Bono**

As the mentoring relationship develops, it may be deemed appropriate by both parties that the mentor should take on a different role with respect to the client's company by becoming a paid consultant, a non-executive director or an investor. Such a role may involve recompense for the mentor's services in the form of fees, salary or share options.

This is understood and is acceptable; however the mentor must keep in mind that this takes them outside of the scope of the ITC engagement letter, which expressly says that there is no charge for the services. The mentor will lose the limitations on liability which the engagement letter provides, and should consider under these circumstances what form of agreement, if any, should replace it, and whether professional liability insurance is needed.