STTI 43rd Biennial Convention
How to Build a Successful Mentoring Relationship

Presented by:
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Objectives of Session

Participants will leave this session with an understanding of:

- Basic concepts of mentoring;
- The Five Phase Mentoring Relationship Model© (MRM);
- How to use the MRM to build effective mentoring relationships.
Who Has Had or Been a Mentor?
Setting the Context

- Career Planning & Development
- Mentoring
- Professional Development
Donner-Wheeler Career Planning and Development Model

- Visioning
- Planning
- Marketing
- Scanning
- Assessing

The Donner-Wheeler Career Planning and Development Model
## Distinctions

- **Preceptorship**
- **Coaching**
- **Mentoring**

Mentoring is a dynamic process that promotes independence, autonomy, and self-actualization of the mentee and fosters a sense of pride, fulfillment and continuity for the mentor.

Adolpho Valadez
Benefits of Mentoring

- Mutually benefit both mentor and mentee
- Career development
- Career satisfaction
- Develop leaders and leadership competencies
- Recruitment and retention
- Pay it forward – benefit the profession as a whole
Your Career Goal

- What career goal do you have that mentoring may help you to achieve?
The Five-Phase Mentoring Relationship Model©
Phase One Purpose

- Why do I want a mentor? Why do I want to be a mentor?
  - What is the career goal that led you to look for/be a mentor?
  - How would having a mentor or being a mentor support this goal?
What Makes Purpose So Important?

Answering why helps you to:

- Develop a clearly articulated intention for the mentoring relationship
- Better identify potential mentors/mentees
- Make a clear request
- Set a strong foundation for the mentoring relationship

“People who know their purpose know where they’re going, what they’re doing and more importantly they know why they are doing it.” – Tim Kelly
Phase Two - Engagement

- How do I begin?
  - Look around you inside and outside the profession
  - Who has/is looking for the knowledge, skills or experience that best matches your goal/your talents.
  - Make a request!
Considerations

❖ Is this a person with whom can develop a relationship?
❖ Is there a good fit: learning style, leadership style?
❖ Is the person willing to dedicate the time?
❖ Is the mentor generally respected?
❖ Is mutually beneficial?

“If you want to go somewhere, it is best to find someone who has already been there.”

Kiyosaki
Elements of an Effective Request/Offer

- Committed speaker
- Committed listener
- Future action and conditions for satisfying that action
- Timeframe
- Mood of the request/offer
- Context
What if the Request/Offer is Refused?

- Thank you!
- Could you recommend someone else who may be interested?
- Ask someone else.
Planning Phase

Two components:

- How will we work together?
  - Develop a mentoring relationship agreement.

- How can I achieve my goals?
  - Create a mentoring action plan.
Mentoring Relationship Agreement

“The quality of the relationship between the mentor and the mentee is what holds the mentoring partnership together.”

P. Caddick

- How will we work together?
- Why is this important?
  - Define expectation of each other in the mentoring relationship – is there a fit?
  - Make agreements up front about how you will address issues.
  - Clarify the “logistics” of mentoring encounters e.g. frequency, timing, process.
What is Involved?

- Reflect on questions about expectations and meet for discussion.
- Come to agreement. Put it in writing.
Sample Questions Mentoring Relationship Agreement

1. Purpose and outcomes of our mentoring relationship (mentee and mentor)

2. Interaction Styles and Expectations:
   - How we will work together to achieve the goals of the mentoring action plan.

3. Mentoring Encounters
   - Expected length of the relationship
   - (Open ended or defined time frame)
   - How often we will meet
   - Best time of day and preferred length of meetings
   - How we will meet (e.g. phone, e-mail, face to face, WebEx), venue
   - Responsibility for initiating contact

Cont’d
Sample Questions Mentoring Relationship Agreement

– Contact outside of planned mentoring encounters for urgent concerns (yes/no)
– Expectations if a mentoring encounter must be cancelled or rescheduled
– How often we will evaluate our mentoring agreement

4. **Warning signs** that there may be trouble with our mentoring relationship.

5. **Actions** we will take and time frame if we are not satisfied in our mentoring relationship.

6. **If we cannot resolve differences** or discover that we are not a good match to achieve our mutual goals, we commit to the following:
Setting Goals

What is a goal?

– Purpose or objective toward which an endeavor is direct.

– Specific, measurable, time-framed, reachable and relevant.
Setting Goals Cont’d

Role of Mentee
- Refer back to purpose and career vision.
- Identify long term goals first.
- Be bold! Strike balance between a challenging goal and realistic goal.
- Identify short term goals - What will I accomplish in the next X months to achieve my goals?
- Choose action steps – WHAT will you do to get there?

Role of Mentor
- Encourage new and creative ways of thinking.
- Encourage mentee to explore possibilities.
- Help the mentee to make decisions.
- Agree upon strategies and activities to assist the mentee to achieve his/her goals.
- Share ideas and resources with agreement of mentee.
Developing Your Mentoring Action Plan

The mentoring action plan includes:

- Goal Setting
- Action planning

“Success comes from taking the initiative and following up. What simple action could you take today to produce a new momentum toward success in your life?”

— Tony Robbins
Sample Action Plan

Career Vision: ____________________________________________________________

Long-term Goal: __________________________________________________________

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<th>Short-Term Goals</th>
<th>Action Steps</th>
<th>Resources</th>
<th>Timelines</th>
<th>Indicators of Success</th>
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donnerwheeler
Building Career Capacity
Emergence Phase

- How am I doing?
- What are we learning?
  - Evolution of the relationship
  - Making the most of your mentoring encounters
  - Evaluation
Evolving the Relationship

- Goals and a clear plan in place
- Relationship has strong foundation and becomes more visible to partners and externally
- Iterative process – as you evaluate each encounter you may go back to the purpose and goals
Role of Mentor
- Leading the conversations
- Setting the pace
- Reviewing progress
- Encourage, support and challenge the mentee

Role of Mentee
- Take action to achieve goals
- Reflecting on progress
- Sharing successes, challenges and new questions as they emerge
Steps in Quality Conversations

1. **Climate Building**, where you establish a relaxed and open environment that is conducive to dialogue.
2. **Clarifying**, where you and the mentee decide and agree on goals and time constraints.
3. **Collaborating**, where you both manage a two-way discussion that achieves the agreed upon goals.
4. **Closing**, where you gain clarification, commitment and responsibility for the next steps.
Making the Most of Your Mentoring Relationship

**Four Fold Way**

- Show up and choose to be present
- Tell the truth without blame or judgment
- Pay attention to what has heart and meaning
- Be open to outcome, not attached to outcome

- Plan the focus of the meeting
- Prepare for the meeting
- Be fully present
- Show up at the agreed time
- Stick to the time allotted
Tracking Progress - Journaling

- Part 1: Preparation
  - Goal(s) for Meeting

- Part 2: Notes From the Meeting
  - Topics Discussed
  - What I Learned/Interesting Ideas:
    - I was surprised by…
    - I was disappointed by……
  - To Do’s

- Part 3: Evaluation
  - Progress on Mentorship Action Plan
  - Possible Adjustments

- Part 4: Evaluation of Mentoring Relationship
  - How am I doing? What is your experience of the mentoring relationship so far? What do you think, feel about this experience?
  - What are we learning? What lessons can we draw from our experience? How can we apply this experience?

- Focus of next meeting
Completion Phase

Goals Achieved

- Celebrate accomplishments
- Evaluate overall relationship and what you have learned along the way
- What are my next steps?
- Redefine the relationship
Completion Phase Cont’d

May be also time to end relationship if:

❖ The relationship is not as rewarding as expected
❖ Other commitments got in the way
❖ Change in circumstances for mentor or mentee

You learn more about someone at the end of a relationship than you do at the beginning.
Why Are Endings Important?

- How we end establishes our memory
- Reflect on the experience
- Acknowledge the impact of the relationship
- Grow your capacity for the next relationship
- Say thank you
- Clearly establish a new beginning
  - Start over with same partner
  - Find another
  - Friendship/colleagueship

All endings are also beginnings. We just don’t know it yet.
Mentoring Checklist

Purpose
✓ I know why I want a mentor
✓ I know why I want to be a mentor

Engagement
✓ I have a mentor
✓ I have a mentee

Planning
✓ I have a mentorship plan
✓ We have a mentoring relationship agreement

Emergence
✓ I am making progress on my learning goals
✓ We are making progress on our mentoring relationship

Completion
✓ I have some next steps
Action Reflection Learning

What stood out for you?
How could you apply the Five Phase Mentoring Relationship Model in your mentoring relationships?
Questions?
Closing

- Mentoring is one strategy for achieving career and professional development.
- Both mentors and mentees benefit from the mentoring relationship.
- Using the Five Phase MRM can help you to make the most of your mentoring relationships.
- You do not need a formal program.
- Look around, reach out, make a request or offer!
Contact Us

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