MENTORING PROGRAMS THAT WORK

JENN LABIN

ATD PRESS
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Foreword

It is no secret that more organizations than ever are embracing mentoring. I use “embracing” advisedly because its pervasiveness and popularity is now undeniable. This groundswell of interest has generated the widespread acceptance of mentoring as a best practice and elevated it to the level of a strategic imperative.

There are many reasons for the increased interest and investment in mentoring:

- While Baby Boomers retire, the 80 million Millennials who are in or entering the workforce believe having a mentor will help them succeed. It is little wonder then that mentoring has become a vehicle for recruiting and retaining future talent.
- Emerging leaders are more likely to be loyal to an organization where they feel valued, and mentoring nurtures and deepens organisational commitment.
- Mentoring builds and strengthens the talent pipeline—it is a leadership competency. So, organizations are investing in leadership development to ensure smooth transitions and continuity of prepared leaders.
- Knowledge silos contribute to a lack of alignment, making it difficult to distribute knowledge evenly throughout the organization. Mentoring facilitates strategic alignment by facilitating and sharing knowledge.
- Mentoring promotes diversity and inclusion, giving everyone an opportunity to learn from the diversity within an organization.
- At the heart of mentoring is a profound personal benefit that goes beyond organizational value.
- Mentoring provides a safety to help and to guide mentees in their career development. By sharing experience and expertise, mentors help mentees avoid common pitfalls that slow or derail learning.
- Mentors help mentees develop the capability, confidence, and competence to accomplish their goals. Because they’ve “been there and done that,” mentors are in a unique position to share what they’ve learned and help mentees understand the skills they need to be successful.
Achieving positive outcomes like these across a broad organizational context is impossible without a solid planning framework. But how do you get there?

If you are a learning and development specialist, talent manager, HR professional, mentoring program manager, or a member of a steering committee charged with launching, executing, and coordinating a mentoring program, you already know that developing a successful program can be a daunting and overwhelming task that takes dedicated time and effort. Unfortunately, time is something none of us has in abundance.

Fortunately, Jennifer Labin has written a primer that simplifies the process. With more than 15 years of experience as a program development specialist, she presents a framework to create sustainable programs that mentoring program managers can easily manage.

Known as the AXLES Framework for Developing Mentoring Programs, her process includes five individual, critical components that need to be planned and designed prior to launching your mentoring program. The five components are align, experience, launch, effectiveness, and support.

Achieving alignment is a priority for me when it comes to mentoring. Gaining momentum and forward traction is impossible without internal and external alignment, which is essential to promoting consistency of practice, cultural fit, and coordination. In addition, alignment maintains integrity and promotes ongoing effectiveness, and interdependence of functions, all while creating the momentum needed for ensuring organizational vitality, viability, and vibrancy. In short, it affects the functionality and effectiveness of mentoring programs. It requires vigilance and steadfastness.

*Mentoring Programs That Work* has the practical tools and best practices you need to create a well-implemented mentoring program. The step-by-step approach to program development integrates diagrams, images, case studies, examples, and key insights and exercises into a practical and culturally malleable process.

Poet Robert Creeley wrote:

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Here is
where there
is.
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If you want to get to where there is, *Mentoring Programs That Work* begins here.

Lois Zachary
Phoenix, Arizona
February 2017
I remember sitting in a frigid classroom at the ATD International Conference & Exposition many years ago watching my facilitator command total engagement from the room. She was passionate, driven, credible, talented, and challenging (in a good way)—a total powerhouse coming in at about 5 feet tall. I thought, I have to learn more from this woman.

So I asked Elaine Biech to be my mentor.

Over the course of my career, Elaine has pushed me to set my goals higher. She has fielded more than one of my calls when I was emotional and needed to process a professional stumble. Elaine encouraged me to not only write my first book, but this one as well. If I said to her, “I can’t do it,” she was always ready to ask, “Why not?”

Elaine is everything a person could want in a mentor; thanks to her, I now have firsthand experience of how a stellar mentor (as a role model, sponsor, and champion) can change the trajectory of a career.

I wanted to help others find the same kind of mentoring relationship I had with Elaine, so I began seeking ways to develop mentoring programs. However, rather than creating new, effective programs, I was repeatedly engaged to help organizations fix their “broken” programs, which were ineffective at best and poorly designed at worst.

There were common issues across these ineffective programs. Each emphasized a learning event, such as launching the program or matching the participants. None of them supported a sustained learning process or created a cohesive and supportive experience for learners and mentors.

So why did these programs fail? The practitioners who originally created them did everything right according to the ADDIE model of training design (or whichever model they followed). The problem was they were applying a training methodology to a nontraining solution.

While developing about two dozen different mentoring programs, I had the opportunity to create a unique approach—one that focused on the amazing benefits mentoring has over traditional training, as well as the risks associated with this
unique developmental solution. The result was the AXLES model, which was created from hands-on, everyday, experimentation.

After I started sharing the AXLES approach with colleagues and saw how helpful they found it, the idea for this book began to take shape. It’s still my mission to help others find dynamic mentors like mine. Writing this book and introducing the AXLES model to the world is the best way I have to empower people to create impactful mentoring programs.

In my journey I have benefited not only from Elaine’s guidance, but from many others’ as well. I’m not the first author to worry about forgetting to acknowledge someone, but I’ll attempt to highlight a few. I continue to learn every day from mentors of the highest caliber. Thank you so much to Elaine Biech, Nancy Duarte, Charlie Gilkey, and Lou Russell for all you contribute to the world of training. I am infinitely grateful for everything you have taught me.

I am also grateful to an amazing group of clients and partners with whom I get to work and learn from every day. Big, thankful hugs go out to Laura Wall Klieves, Kevin Friesen, Eric Albertson, and the whole Duarte Academy team. I am also thankful to Randy Emelo, George Hallenbeck, Davida Sharpe, and Floyd Carlson, who have been partners, thought leaders, and contributors as I strive to get the word out about mentoring.

I also want to thank Michael Lee Stallard, Jeanne Masseth, and Jean Williams, who have been so generous to contribute to this book. So much gratitude also goes to Wendy and Jim Kirkpatrick who have not only given their time to this book, but have also been champions and mentors for me for a number of years.

The work we do at TERP associates involves a team of people who wear different hats depending on our clients’ needs. We would not be able to deliver such results to our clients without Diana, Jax, Megan, Insoo, and the rest of the TERP family. Thank you!

This brings me to Kelly Irons, my business partner and other half of my brain. There just aren’t enough words to express everything I have learned from you. You are an incredible mentor.

And last, but never least, I am grateful beyond measure for my family. Jon, Zoë, and Aria, you are more supportive than I could ever hope for, and more amazing than I could ever dream of. You are my daily inspiration.

With much gratitude,

Jenn Labin
People who add value to others do so intentionally. I say that because to add value, leaders must give of themselves, and that rarely occurs by accident.
—John C. Maxwell

Mentoring is set apart from other types of talent development by one simple fact: Mentoring relationships are highly impactful. They drive results, challenge talent, and change careers for the better. The following are some typical experiences talent development practitioners have had in their own mentoring relationships:

“My mentors have given me perspective when it was most critical, security that I’m never far from wise counsel, and inspiration to pass on that same gift to others. What other investment yields such rewards?”
—Kevin Friesen, Duarte

“Mentoring has been an integral part of my development and growth, both professionally and personally. My experience with mentoring has opened doors as well as my eyes to all sorts of opportunities.”
—Crystal Richards, Principal, Mosaic Resource Group

“Mentoring has been one of the primary pillars of my career. Without the guidance, perspective, and insight from more tenured partners in my field, I would not be where I am today.”
—Jacqueline Geary, Talent Development Analyst, Aerotek

These positive real-life experiences are corroborated by research on the effect of mentoring. For example, the Corporate Leadership Council (2005) found that “‘feedback and relationships programs’ [such as mentoring] outrank ‘experience-based’ and ‘education-based’ development programs.” And, in its publication
Best Practices: Mentoring, the U.S. Office of Personnel Management (2008) noted that, “From increased morale to increased organizational productivity and career development, the benefits of an organization that actively supports mentoring are numerous.”

Randy Emelo highlights mentoring’s ability to create an innovative, “nimble workforce that can adapt to rapid change, new demands, and unforeseen challenges” in his book, Modern Mentoring (2008). He goes on to emphasize how critical it is to provide ways for employees “to connect, collaborate, learn from, and share with their colleagues across all levels, locations, and functions.”

Finally, Linda Phillips-Jones (2003) writes in The Mentor’s Guide that “powerful things happen when a respected, experienced person shows interest in and goes out of his/her way to help another individual develop, especially when that individual is open to being influenced.”

But, if everyone agrees that mentoring is so valuable, why doesn’t every organization have an effective mentoring program? Proving the value of mentoring is not the problem. The real issue is the plethora of ineffective formal mentoring programs, which fail because of poor alignment, unskilled mentors, or lack of leadership champions for the programs, or because the programs aren’t sustainable or scalable.

Creating an Effective Mentoring Program

Organizations may set out intending to build valuable and effective solutions, but if practitioners can’t visualize the why and how of mentoring programs, they will fail.

The disciplines of instructional design and talent development teach you how to build classroom training and e-learning programs. But developing mentoring programs requires a different set of skills. Talent development practitioners are involved in numerous development and launch projects over their career, which gives them the opportunity to develop and refine techniques that work in different situations. However, an organization might only implement a single mentoring program, or maybe a couple across a larger organization. Thus, few practitioners have the opportunity to find out which choices work best in different mentoring applications. In addition, it’s often challenging to figure out what might work when developing formal mentoring programs, without having a map or stakeholders to act as champions for the program. While there are many models for building training, nothing specifically addresses the unique aspects of how to build a successful mentoring program.

Classroom-based learning provides ample opportunities to see progress and challenges firsthand. Virtual training (for example, over web-conferencing software) also uses real-time cues to let facilitators and program administrators change course in their techniques, if necessary. Even e-learning is highly tracked and observable.
Mentoring programs are different because learning happens “out there”—away from classrooms, webcams, and learning management systems. In a mentoring relationship, there is usually a mentor (a more experienced individual providing guidance and support) and at least one learner (a less experienced individual seeking guidance and support). This dynamic creates a sharp contrast from the traditional one-to-many classroom model, and thus has its own benefits, challenges, and measurability.

**Benefits of a Successful Mentoring Program**

Because mentors can address whatever the learner needs in the moment, without having to focus on predetermined content, learners can enhance their skills and knowledge in a variety of areas and have the flexibility to explore topics with the greatest urgency and importance. In one mentoring conversation, a learner might enhance her confidence in presentations, and in the next, she might focus on strategies for product marketing.

In addition, because learners are able to get the guidance they need from their mentors when they need it, there is greater applicability. For example, during a mentoring conversation, a learner might ask for direction about how to approach an executive about a new project. The mentor might provide some ideas, and use interactive questioning to help the learner brainstorm other ideas. The learner now has an action plan, and could meet with the executive that afternoon. He may also connect with his mentor the following week to discuss how the meeting went and get follow-up advice.

Mentoring programs create a learning environment that is more sustainable than many training solutions because it is based on connections between people instead of events. Development that results from mentoring is likely to last, in part, because mentoring relationships are often nurtured and longer lasting. Continual reinforcement over the course of a mentoring relationship ensures that learners are aware of their progress and can seek ways to apply their increased skills.

**Challenges of a Successful Mentoring Program**

Mentoring programs also come with their own challenges. The most important difference between mentoring programs and training is that the success of the mentoring program hinges on the participant experience. Program developers must anticipate how to create the right amount of structure and support for the organization, whereas program administrators have to be responsive to the ongoing needs of their learners and mentors.

A program developed with a lot of structure, rigid requirements, multiple check-ins, and frequent participant surveys will fail in an organization that thrives on
innovation and a collaborative work environment. Conversely, informal programs with very little in the way of communication or administrative support will fail in more traditional and hierarchical organizations.

Because mentoring programs are not typically based on prescribed content, new and unique requests constantly arise during their life cycle. Administrators may be called upon to create new job aids, provide readings and resources, or help create relationship matches. If the program isn’t supported by administrators who can be responsive, participants will not make the program a priority.

Another challenge is that while facilitators can observe a classroom and a learning management system can record e-learning clicks and tests, mentoring programs exist outside the control of a program leader or administrator. Mentoring conversations are not observed by a third party, and how learners apply what they have learned from a mentoring conversation is typically done on the job, away from direct observation of a program administrator. This lack of transparency can sometimes seem daunting. Practitioners in the talent development industry are often far more comfortable with learning they can easily observe and measure in a classroom than the type of growth that comes from connections in mentoring conversations. While performance improvement as a result of mentoring is measurable, there are fewer examples of how to measure it than more traditional learning approaches.

However, a relationship-based learning process such as mentoring will likely create far more effective results across your organization than staying within the comfortable bounds of classroom training or e-learning. Encouraging mentoring relationships to form, and supporting those relationships with the ideas described in this book, will help create deep learning experience; the impact will be more influential and last longer than traditional approaches.

The foundational idea is that mentoring programs are different in many ways from classroom training or e-learning. The approach to developing an effective, sustainable program requires a different mindset and strategy. Leveraging a process that takes the unique aspects of mentoring into account will set your program up for lasting success.

How Mentoring Is Different From Coaching
If you do a quick search on “coaching versus mentoring,” you will uncover a wide spectrum of definitions. However, these definitions can be distilled to the idea that mentoring is broad, covering both professional and personal issues, while coaching is task-oriented and focused on specific performance gaps. On the other hand, some well-established organizations such as the International Coach Federation (ICF)
define coaching as “partnering with clients in a thought-provoking and creative process that inspires them to maximize their personal and professional potential, which is particularly important in today’s uncertain and complex environment.” So if coaching is a relationship that helps build on personal and professional potential, what is mentoring? Everyone has an opinion about the right answer, and it’s true that mentoring and coaching are closely related.

In every client engagement, I work with teams to define mentoring for their organization because I have a mantra: “Words are important; language matters.” For our purposes, this book takes a broad view to mentoring programs, which makes it more applicable across a wide variety of purposes. The following list of terms outlines the definitions we will use going forward in this book:

- **Mentor**: A more experienced individual providing some amount of guidance and support to another individual.
- **Learner**: A less experienced individual seeking guidance, support, or knowledge from another individual; also referred to as a mentee or protégé.
- **Participants**: The collective members of a mentoring program, including mentors and learners.
- **Mentoring**: The relationship between at least one learner and at least one mentor.
- **Mentoring Program**: A variety of structured and managed mentoring relationships within an organization.
- **Coaching**: A skill set used to help a learner grow and develop. It usually involves active listening and asking guided questions to encourage the learner to come up with solutions to issues.

Your organization’s definition of mentoring doesn’t have to be static; the critical thing is developing a common vision, even if it’s one that evolves over time. Defining mentoring is incredibly important for your mentoring program’s success, and it starts with clarity of purpose and mentoring philosophy.

An effective, long-lasting mentoring program cannot be developed if everyone is coming from a different perspective. It is very challenging to collaborate on building an effective mentoring program if we haven’t all agreed on what we believe mentoring actually is! Maybe your organization aligns with the idea that mentoring is “a more informal association focused on building a two-way, mutually beneficial relationship for long-term career movement” (ATD 2015). Or perhaps your company believes mentoring “is a mutual discovery process in which both mentor and mentee have something to bring to the relationship (‘the give’) and something to gain that
broadens each of their perspectives (‘the get’)” (Zachary 2002). Whatever your approach, the most important first step is to define mentoring within your organization. If you can gain agreement among major stakeholders, you’ve already taken a big step toward making your mentoring program successful.

**Mentoring Relationships Are About Connection**

Every mentoring program is unique because it exists within a singular organization composed of an audience with specific needs, pursuing results important to that organization at that point in time. From program to program the structure, formality, complexity, management, and experience will differ. Even the language—terms for the mentor and learner, for example—will shift from one instance to another. However, the powerful common thread through all mentoring programs is connection. Mentoring is about relationships, which are more important now in our professional lives than they have ever been.

**The AXLES Framework for Developing Mentoring Programs**

One obstacle for many organizations in building an effective and sustainable mentoring program is the lack of a tried-and-true process. The models that do exist aren’t tailored specifically to developing mentoring programs, even though they are so different from any other type of talent development solution. Familiar models, such as ADDIE, don’t work well when applied to mentoring programs. ADDIE is often criticized as a “waterfall” methodology that is rigid and unforgiving when projects change.

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**What Is ADDIE?**

ADDIE is one of the most popular approaches to developing learning solutions. This framework has five stages:

- **A = Analysis** is understanding the needs of the learners, content needs and gaps, and contextual organization information.
- **D = Design** is creating outlines, briefs, and other forms of explaining the potential flow of learning activities.
- **D = Development** is crafting and developing the various materials needed for the learning event. These include e-learning modules, participant guides, job aids, and slides.
- **I = Implementation** is providing the learning solution to learners.
- **E = Evaluation** is measuring the effectiveness of the learning solution.
While all of the components of ADDIE are addressed in some way during the development of a formal mentoring program, more flexibility is needed in the approach. Even more important, while ADDIE is useful for creating event-based learning solutions, it does not address the unique needs of a sustained learning relationship like mentoring.

In 2012, it became clear to me that we needed a better process—one that was easy to follow, but specifically created for mentoring programs, capturing the challenges and benefits that mentoring brings to organizations. For the next three years, I drafted and refined my model in several iterations. The final result—the AXLES model—is the framework for this book (Figure I-1).

**Figure I-1. The AXLES Model**

The AXLES model for developing mentoring programs is the first framework entirely devoted to the unique challenges of a sustained learning process. It is composed of five individual components—align, experience, launch, effectiveness, and support—each addressing a critical aspect of a mentoring program. These five components need to be planned and designed before a program launch. In addition, they create a checklist of the parts you need to maintain over the life cycle of the program.

The first component, Align to a Purpose, helps define the intention of the program. During this phase, program designers ask critical questions that will help make the program successful, and establish strategic partners for the organization. Every component of the model has a concrete deliverable that propels us toward results. In the Align to a Purpose stage, you will create a purpose statement. Aligning
the program to the organization’s needs ensures that the program’s purpose is documented and gives the program direction during design and launch.

The second component is Design the Experience, during which design decisions are made for the program. Key choices are covered in this step, including program structure, schedule, participant matching, and expectations. Once the look and feel of the program is determined, you’ll create the program charter. Like most deliverables, the program charter is a living document that changes throughout the program’s development and life cycle.

Launch the Program is the third component. Launching your program is not the end of the road, nor is it a stand-alone event. Implementing a mentoring program for the first time (or annually, as you will see) is an important milestone, and part of a cohesive experience for participants. Example launch agendas for the program are provided, as well as other tools to help design the program launch.

During the fourth component of the program, you will Evaluate Effectiveness. During this component, you’ll plan different types of important measures. The focus is on writing a meaningful story of the program’s success using data from your evaluation plan.

Support Participants, the final component, is a phase during which you consider what your mentors and learners need to have a successful experience. This phase is intended to help you design and develop resources, webinars, videos, or other performance support aids. The deliverable of this component is a participant playbook, which usually includes important resources and tools for participants to refer to throughout the mentoring relationship. Learners and mentors should be equipped with the resources they need to make an impact and experience real and lasting change.

The strength of the AXLES model is its simplicity and intuitiveness, but it also considers the challenges and results of mentoring programs. A significant portion of the design can happen iteratively, focusing on the minimum viable product. Individuals and teams can work on any and all of the components of the model concurrently, as long as the design for all five components is completed before the mentoring program begins.

This process includes all the necessary steps to create a meaningful mentoring program. Each chapter in this book details one of the five steps and how it helps focus the work of developing a mentoring program.

**Broken Programs**

Many existing mentoring programs are poorly developed, thanks to everything from poor planning and lack of alignment to a gap in participant support or failure to plan for program maintenance. Ineffective programs waste the time of both mentors
and learners, and ultimately drain organizational resources. In addition, it becomes more difficult to gain buy-in for new mentoring programs when so many have been ineffective in the past.

Fortunately, organizations are looking for a solution. The AXLES model works for both new mentoring programs and programs that need to be diagnosed and improved. Throughout this book you will find specific references to how to leverage the AXLES model to iterate and improve ineffectual mentoring programs.

The Way Forward

If developed correctly, mentoring programs have the potential to be the most effective tool in your talent development kit. Regardless of whether you are just beginning your journey to build a mentoring program, have already started, or are even working to improve an existing program, utilizing the AXLES model will put you on the path toward success.

In this book, you will find several features that will help you as you begin developing your mentoring program:

- Diagrams and images provide visual representations of concepts.
- Case studies written by industry leaders share specific experiences and best practices for developing mentoring programs.
- Key insights pull out the 10 most important ideas from each chapter.
- Chapter exercises give you the chance to put these ideas into action—remember, application is the best teacher!

Most important, as you read the ideas covered in this book, ask yourself, “How does this work for me, my mentoring program, and my organization?” Keep an open mind, but also treat each idea as a piece of a larger puzzle. You won’t be able to connect every piece right away, but as you continue working on the project, you’ll see how that piece helps you get to the goal.

Mentors and Mentoring: More Relevant Than Ever

Michael Lee Stallard, President, E Pluribus Partners

The world has become increasingly complex, and additional skills are required to succeed. At the same time, research has shown that fewer family members and friends are available to help individuals develop the social and resilience skills necessary to cope with life's inevitable ups and downs. Mentors help fill this gap. Companies that meet this need for connection will have a competitive advantage in attracting and retaining talent. When McCann Worldgroup
surveyed 7,000 Millennials, it found that their number one value was connection, which means that mentoring is becoming more important than ever.

**Specific Skills Mentor**

The first type of mentor I learned from is the specialist who helped me develop specific skills and stop doing counterproductive things. This type of skills-based mentor can identify blind spots that are holding you back.

Take, for example, public speaking. Twila Thompson from The Actors Institute in New York City helped show me that decades of working on Wall Street had taught me to turn off my emotions when I spoke publicly. I would need to turn my emotions back on to connect with an audience. Twila and her colleague Gifford Booth trained me to make eye contact with one audience member at a time, and stay with that person until I could tell we had connected before moving on. They taught me to speak with greater volume and emotional range. At first it felt very uncomfortable, but they assured me it was not overbearing and was more engaging for the listener. I never would have figured this out on my own.

**Situational Mentor**

A second type of mentor helped me during a difficult time in life. In 2004, my wife, Katie, was diagnosed with advanced ovarian cancer a year after she was treated for breast cancer. Between the plan prescribed by the medical team and research I did on my own, I struggled to find out what medical treatments would cure her. I wondered how I could best help her and our daughters, who were 12 and 10 years old at the time. When I posted Katie's diagnosis in online forums for ovarian cancer, patients and survivors responded, sharing their stories. Helen Palmquist, from Libertyville, Illinois, was especially helpful. She had a diagnosis similar to Katie's and had survived for more than 15 years. Helen mentored me through her emails and phone calls over the course of Katie's treatment. Those supportive conversations helped me cope with my own stress, fear, and anxiety, so that I could be there for my wife and daughters.

**Tacit Skills Mentor**

Sometimes my mentors are not even aware that I think of them as mentors and am observing how they model certain behaviors. For example, my wife has extraordinary social intelligence and social skills. While I enjoyed connecting one-on-one, I was never at ease casually connecting in a group. Watching Katie in social settings helped me understand how she asks questions and interacts with people in ways that connect without going too deep. Thanks to Katie, I've become much better at this.
The Mentor You Never Meet

I would not limit the pool of possible mentors to someone you can email, meet, or Skype with at an agreed-upon time. My own list includes several authors who have effectively mentored me through their books, which have inspired or challenged me. For example, Parker Palmer’s *Let Your Life Speak: Finding the Voice of Vocation* helped me find the courage to change careers and start a new business. I’ve also learned a great deal about mentoring from Don Yeager, a former *Sports Illustrated* writer and editor turned corporate speaker. Don co-authored a fantastic book on the subject with the legendary UCLA basketball coach John Wooden (a.k.a. the Wizard of Westwood), titled *A Game Plan for Life*. Here are three pointers from that book:

1. Just Ask
   Don’t hesitate to ask someone to mentor you. You’d be surprised at how infrequently people ask others to be their mentor. In the book, Don recalls asking Coach Wooden to mentor him, assuming it was highly unlikely that he would. Coach Wooden said yes, and ended up mentoring Don for more than 12 years.

2. Failing to Prepare Is Preparing to Fail
   Coach Wooden was known for focusing on preparation. He told Don that his job as a learner would require him to prepare a list of things he wanted to learn. As a result, Don spent two to three days preparing for each meeting with Coach Wooden. If you’re asking someone to mentor you, be sure to spend sufficient time preparing in advance and developing an agenda for what you would like to learn.

3. For a Season
   We tend to equate a mentoring relationship with a lengthy time commitment, which may preclude us from entering into one. However, what you need from a mentor may only require a single meeting or a few meetings. You may find that more people are open to the arrangement of being a seasonal mentor, sharing their wisdom on a particular area for a relatively short period of time.
Key Insights: Introduction

1. Mentoring relationships are highly impactful and often more consistently effective than other types of talent development.
2. The number of poorly developed mentoring programs has created opponents to formal mentoring programs.
3. Unlike other types of talent development, until now there hasn’t been a well-known, vetted process for developing a mentoring program.
4. The results of formal mentoring programs come from learning that happens outside the sphere of influence of program administrators.
5. Mentoring programs have the potential to bring about great results, but for them to be successful some unique challenges must be addressed.
6. The terms coaching and mentoring have many definitions. It’s important to come up with a unique definition for your organization.
7. “Words are important; language matters.”
8. Determine the purpose of your mentoring relationships and programs before you set out to design them.
9. Use the AXLES model to create a new mentoring program or improve an existing program.
10. Keep an open mind, and apply the ideas in this book to your specific situation.

Chapter Exercises

Individual Reflection Questions
Think about your experiences in mentoring relationships as a learner or mentor. (If you have never participated in a formal program as a learner or mentor, ask these questions of your supervisor or a colleague.)

- Describe a negative experience with a formal mentoring program. What made the experience negative?
- Describe a positive experience with a formal mentoring program. What made it positive?
- How do you define mentoring?

Team Exercise
If you are currently working with a team to develop a mentoring program for your organization, or improving an existing program, answer the following questions collaboratively:

- What is our organization’s working definition of mentoring? If we don’t have one, who can help us create one?
• Who in our organization is going to be a champion for our program? How can we get them involved?
• Who might resist the program in our organization? Why? What can we do to alleviate their concerns?
• Discuss the AXLES model as a strategic plan for creating your mentoring program. How can we align this with our team’s operating rhythm?
Stories of Experience

When I’m preparing for a swim, I imagine absolutely everything about it: the color of the water, how cold it is, the taste of salt in my mouth. I visualize each and every stroke.

—Lewis Gordon Pugh

Mentoring Programs Come in All Shapes and Sizes

I have never seen two mentoring programs that are exactly alike. Even when they have many identical features, subtle differences in areas such as organizational culture play an important role in how participants experience the program.

Imagine that mentoring programs are like species of fish. They all have scales and fins and live in the water, but their colors, behaviors, food sources, and environments vary widely. Similarly, all mentoring programs are about connection, but the purpose, design, and outcomes are very different.

A common obstacle is that the people who are building the program have different ideas of what mentoring should look like—they may even use the same terms but mean different things. This is why talking about the mentor and learner experience is key in defining the outcomes of a mentoring program. By describing how the program is carried out, what it looks like, what learners are expected to do as a part of the program, and how mentors will be supported, we can begin to build a common understanding.

This chapter features five stories that illustrate different mentoring program experiences. Each anecdote is a patchwork of a real program and the learners and mentors who participated in it; these stories are true to the spirit of the many individuals I have had the pleasure of working with while preparing to write this book.

Trey: A Learner in an Effective Informal Mentoring Program

“Life-changing.” That’s how I would sum up my mentoring experience. When they launched the program, I was one of the first to sign up and request a mentor. As a
manager, I’m always looking for ways to be a better leader. At our organization we have a strong culture of learning from one another, so the mentoring program simply put more structure to what was already happening. The program administrators did a great job of communicating the purpose of the program, how it would work, and what we could expect if we participated.

The program was scheduled to run annually between February and October, and anyone who wanted to participate could register. All I had to do was give the program administrators some information about what I was looking for, and they provided a list of available mentors, their bios, and other relevant information. It was easy to find a potential mentor; the one I chose happened to be in my same role in another region. It turned out that other people in our roles across the company were also looking for a mentor, so we formed a six-person peer-mentoring group. It was perfect; we were already used to the group dynamic because of how collaboration-driven our organization is.

As a peer-mentoring group, we had access to sample agendas, tips on how to function in the group, and ideas about how to drive ourselves individually within the group. We had all the tools we needed to be successful. And it didn’t end there. The program administrators reached out periodically to make sure we had everything we needed. We also received pulse surveys throughout our time together to give our feedback. A few people left over the course of the year, but a couple new folks joined us. The group is still meeting monthly with ad hoc calls as needed.

I have grown so much as a result of my peer-mentoring group. I set out to use mentoring as a way to become a better leader, and I can see the results. This program provided exactly what I needed to grow my skills, and I’ve been able to help others as well.

The programs that experience the best results are those that align their structure and design with the organization’s culture. Some organizations thrive with informal, collaborative, or matrixed designs, while others expect a more formal structure. It is critical to take the time to understand what the organization’s most important needs are and how to meet those needs with mentoring. These key factors will be discussed further in chapter 2, “Align to a Purpose.”

Rita: A Learner in an Effective Formal Mentoring Program
My experience in the mentoring program was great! The entire process was communicated well, and I knew what to expect along the way. As soon as I was accepted into the program, I received materials outlining what the program would consist of,
meetings that would happen, and due dates. The program administrators explained that each learner would be matched with a mentor, and that the formal relationship would last for six months.

The program had a lot of moving pieces and was a good amount of work, but it was completely worth it. I completed an assessment, and was matched with a department head based on that and my individual development plan (IDP) goals. After the virtual launch event, we were expected to meet with our mentors at least every two weeks, and complete some assignments between meetings. It was a challenge to get it all done, but I knew what to expect because everything had been explained at the beginning of the program.

The program’s structure worked great for us. My mentor and I had a game plan to work with, were never confused about what we should be doing, and knew where to get answers if we had questions. By the time my formal mentorship ended, I felt as though my IDP performance goals had improved a lot.

The learner and mentor experience is paramount for success in any mentoring program. This organization required a formal structure for the mentoring relationship, and the culture valued the extra effort spent in pursuit of talent development. Many organizations worry that learners and mentors are too busy to take on the demands of the mentoring relationship, but in reality many participants see the value and are more than willing to make the effort. Chapter 3, “Design the Experience,” provides a step-by-step process for making design decisions about structure, schedule, and matching.

Nathan: A Mentor in a Poorly Managed Mentoring Program

When HR asked me to be a mentor in the newly redesigned mentor-led group-mentoring program, I was happy to participate. They weren’t looking for too much effort; just mentor a group of fewer than 10 people once a month. I learned later that the program is ongoing, with no planned end date. I’ve got plenty on my plate already, but as a senior leader in my organization, I know how important it is to develop our talent. So I agreed.

I have to say it was pretty disorganized. First they told me I would be working with a group on business acumen, which is right in my wheelhouse, so that was fine. But the week of our first meeting, they switched me to a group working on presentation skills. Hardly my strength! I’m not terrible at it, but I had no idea how to mentor a group of people on that topic. Then I had to scramble to do some research because the program administrators didn’t have any resources to help me.
Our mentoring group “launch” was more like a false start. We didn’t have an agenda for our meetings (until I made one) or an idea of how to set goals for the group. In addition, because I was given a group with a full 10 people, I’m sure some of them didn’t get what they needed. I don’t think anyone can be truly effective with that many people in the room. That first meeting was awkward and kind of disheartening.

Eventually, we got into a rhythm with our meetings, but not until after we had lost a few people. They just stopped showing up to meetings. I emailed the program administrator to let him know, but he had already heard and just hadn’t communicated with me.

Overall, it was like that nightmare when you show up at school and realize you’re naked. I was standing in front of 10 people with no idea of what to do. Instead of an inspirational start to our mentoring relationship, it was a terrible experience! I won’t be signing up to mentor again after this.

A mentoring program’s launch should be well thought out. Each connection point presents the possibility for the program to succeed or fail. Whether there is a large launch event, or a soft launch where mentoring relationships are formed, the beginning of the process is a critical time when expectations are met or not. For more information about ways to launch a mentoring program, refer to chapter 4, “Launch the Program.”

Indira: A Mentor in a Well-Managed Mentoring Program

As an organization, we have been looking for ways to increase our retention. The mentoring program is part of the solution we’ve been putting in place for the last year and a half. As part of the leadership team, I received updates about the mentoring program from the design team during the entire development process. They kept us informed of what they were trying to accomplish and how the program was being built to address the organization’s most critical talent needs. Communication is really important to me.

When it came time to recruit mentors, I was all in. I had already seen how the program aligned with our strategic goals, so I knew how my participation would help us achieve results. Once we signed up, the program staff communicated thoroughly and often about expectations and milestones. They explained that each mentor would be assigned one learner, and that the formal relationships would be scheduled to last a full year. They even built in a six-month checkpoint when we could change learners if needed.
One aspect that really impressed me was the brief pulse surveys that the program administrators sent out to learners and mentors every two months to assess progress and gather feedback. They then shared the results of each survey and let us know how the feedback was influencing ongoing program improvement.

The program administrators also conducted focus groups periodically with a few participants to receive anecdotal feedback and get suggestions that might not be captured by a survey. Overall, they were focused on getting real impact data, and they did it in a way that didn’t take too much effort from us. We weren’t overloaded with long surveys that didn’t get analyzed.

At the end of the mentoring relationship, both the learner and the mentor met with the learner’s supervisor to discuss development and progress on the learner’s goals. The results of those conversations were captured in our learning management system and given to the team.

I also completed a final survey about my assigned learner and her progress, as well as a final feedback survey about the program. My learner completed an evaluation of me as a mentor, which gave me some great insights on how well I performed my role as mentor.

Within two weeks of submitting our information, we received final reports of how we did compared with others in the program, as well as key insights to think about moving forward. The program team also continues to give the leadership team regular updates on several different factors. We receive quarterly status reports with data on mentoring relationships, learner goals, mentor scores, and so forth. We also get updates twice a year about how well participants in the program are doing back on the job with their new skills.

The best part, though, is our retention scores. Since we started the program 18 months ago, our retention numbers have started to move in the right direction. The program team has been able to show the program’s success and its impact on retention. Our organization is seeing exactly what we hoped for thanks to the team’s ongoing diligence in evaluating the program.

Evaluating mentoring programs can seem daunting. After all, we don’t always do a great job of measuring the impact of training classes that happen within our span of control—how can we be responsible for mentoring that happens outside our reach? There are many ways to build an evaluation plan for mentoring programs to show results, gather feedback for the purposes of program improvement, and collect information on both mentors and learners. Chapter 5, “Evaluate Effectiveness,” looks at the many options available for effectively measuring program success.
Chapter 1

Rachel: A Learner in an Ineffective Informal Mentoring Program

Every year, my company nominates two people from each department to be in the leadership development program. I’ve been looking forward to the opportunity for three years. After all, this training program is only available to a few people, and it includes a senior leader as a mentor. I couldn’t wait!

Unfortunately, the reality turned out to be very disappointing. I didn’t get any information before the program started, just a calendar invite to come to the training room on the date the program launched. I had no idea what to expect.

Don’t get me wrong, I was still excited to get a mentor, but I was apprehensive about what I was walking into. I thought for sure this was a meeting where I would get to meet my senior leader mentor, maybe a vice president or director, and we could get started. Instead, the mentors weren’t even at the meeting. The meeting was for the learners to fill out applications to be matched with mentors.

Fast forward to when I was finally matched with a mentor, who was a VP from another department that I respect a lot. You’d think the rest would be a slam dunk, but it was pretty awkward. For one thing, neither of us was sure why we were matched (not that I’m complaining!). Once we started our meetings, we weren’t sure how to get started or what we should cover. We had to sort of feel out the relationship—I assumed she would know what our goals were or what we should discuss, but she said she was leaving it up to me. While it was nice spending time with her, some of our meetings were just social coffee and didn’t really help me in the long run.

After a few months we got an email from the program administrator. (The only one after the program launched, by the way!) The email said that the program was ending for the current year and we should conclude our formal relationships. Well, you can imagine that if we didn’t know how to start, we surely didn’t know how to finish either!

Overall, I’m not really sure what I expected from the mentoring program, but it wasn’t this.

Very often, mentoring programs fail, not because of design, but because of communication and alignment. Mentoring relationships get started and thrive in isolation from a facilitator or program manager, and need a strong foundation on which
to build. Learners and mentors (even experienced ones) need clarity on what to expect from the program, how to best conduct their roles, and how to gauge success. Participant support is a theme throughout the book, but chapter 6, “Support Participants,” goes deeper into the topic.

**Conclusion**

Once on the path to developing a mentoring program, there are many options available to create a sustainable, impactful mentoring experience. The stories in this chapter are intended to help you think through the experience your participants should have, and influence your development process and design decisions.

Seeing the many factors that contribute to the success (or failure) of mentoring programs helps to illustrate why each step of the AXLES model is critical for developing mentoring programs. Each of the following chapters is aligned to a step in the AXLES model, and guides you through the process of aligning, designing, launching, evaluating, and supporting your unique mentoring program experience.

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<td>1. Mentoring programs take many different forms.</td>
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<td>2. Even within a development team, individuals have different visions of what a program should look like and what different terms mean.</td>
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<td>3. Programs often fail due to lack of communication with participants, especially when learners and mentors do not feel supported.</td>
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<td>4. Setting expectations for participant roles and effort is critical to a positive program experience.</td>
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<td>5. Each organization’s needs are unique, and taking time to align the mentoring program with strategic goals is the only way to see long-term results.</td>
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<td>6. Mentoring programs succeed or fail based on participant experience throughout the program life cycle.</td>
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<td>7. Mentors are linchpins when it comes to mentoring programs—supporting them and communicating with them is very important.</td>
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<td>8. Program launches (no matter what form they take) are important to setting the stage for success in mentoring relationships.</td>
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<td>9. Communicating with leadership during program development is a great way to generate interest and recruit mentors.</td>
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<td>10. Evaluating the effectiveness of mentoring programs through multiple methods will help tell the story of the program’s success.</td>
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Chapter 1

Chapter Exercises

Program Visioning Activity
Consider the experience your learners and mentors will have in your program. Use the following questions to describe the program you are developing or adapting:

- What words or phrases do you want your learners to use to describe their experience in the program?
- What attributes of their experience in the program will be most important to your learners (mentor title, networking possibility, time and effort spent, measurable progress, and so forth)?
- What words or phrases do you want your mentors to use to describe their experience in the program?
- What attributes of their experience in the program will be most important to your learners (learner role, time and effort spent, measurable results, and so on)?

Team and Stakeholder Exercise
If you are currently working with a team to develop a mentoring program for your organization, or improving an existing program, review your answers to the previous questions together. Then interview your key stakeholders, including the project sponsor, using the questions above.
References


About the Author

Jenn Labin is the owner of T.E.R.P. associates, a team that seeks to grow talent and ignite potential. For 15 years, she has worked with a wide spectrum of organizations including large private-sector businesses, government and military operations, and higher-education institutions, specializing in implementing high-impact and high-value employee development solutions.

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