

How to Define, Design and Deliver the Right Type of Formalized Mentoring Program

by

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What not to do:

Before contacting us, a major oil company (Shell Oil in Malaysia) had hired an external consultant to design a Mentoring Scheme for 300 proteges and 300 mentors. Because goals were not defined, most proteges were matched with “wrong” mentors who could not help them achieve intended goals. Program delivery consisted of training proteges and mentors separately (each group trained for a week) – without a coordinator to ensure mentoring partners were meeting and everything was working.

The result: Mentoring Partners did not know HOW to engage in effective mentoring when meeting together. Over 12 months, 600 participants wasted their valuable time, because mentoring did not enable proteges to meet their individual needs and achieve desired goals, nor did it reduce turnover or enable career exploration, as expected. So, Shell Oil wasted over \$1,000,000.

Why did this costly failure happen? The mentoring consultant was operating at the *Novice* or *Advanced Beginner Level* [see table at end of article]. Consultants at these lowest levels might “know about” mentoring from readings or seminars, but lack the “practical know-how” needed to plan and align all components of a Formalized Mentoring Program and then implement this so that intended outcomes are produced to satisfy the Business Case for the program.

After the first year of operation, the oil company hired an outsider to be mentoring coordinator, with responsibility for salvaging the program and producing intended goals. He visited mentoring experts across North America and England to learn firsthand what each could provide, and then selected my partner (Marilynne Miles Gray) and myself because we had a proven track record of operating at the *Expertise Level* with four other oil companies in defining, designing and delivering essential components for different kinds of successful formalized mentoring programs. We knew from practical experience that neither *one-size-fits-all mentoring* NOR *do-your-own-thing mentoring* can produce intended outcomes for all individual proteges, for the sponsoring organization (so the program continues), and for the mentors (so they volunteer again).

What we did: define and design essential program components:

My partner and I went on-site for three weeks to perform a series of tasks. First, we evaluated the existing Mentoring Scheme using surveys and structured interviews – because we suspected that the existing single Mentoring Scheme was inappropriate for all 300 proteges. Second, using evaluation data we identified three types of proteges, at different stages of career development, with different sets of needs, requiring different kinds of mentoring. Third, we helped the coordinator assemble a Mentoring Task Force, comprised of a representative from each of the 12 participating business units – to provide local coordination and be trained as trainers for the program.

Fourth, with input from the Mentoring Task Force and focus groups (comprised of participants), we facilitated **Collaborative Program Planning** to define and design three different types of Formalized Mentoring Programs. Task Force members were invaluable in identifying program and protege goals that were appropriate to their particular business unit.

- ❖ To meet the goal of getting newly hired university graduates up-to-speed faster, we designed an **Orientation Mentoring Program** in which capable peers would serve as mentors. Our *Protege Needs Inventory* enabled each protege to identify specific needs so that peer mentors could systematically provide needed assistance.
- ❖ To reduce the costly turnover of high potentials – at a time when promotion was not possible -- we designed a **Career Expansion Mentoring Program** that enabled these proteges to expand their technical expertise by carrying out a carefully planned, highly challenging *Mentor-Assisted Project*TM in the mentor’s area of expertise.
- ❖ To enable longer-term employees to explore and choose a career path that was best for them and for the company, we designed a **Career Path Mentoring Program**, in which top-level technical and managerial veterans would provide mentoring.

Typically, **Collaborative Program Planning** requires 1 or 2 days – when designing a smaller Pilot Program for 15-30 pairs of mentoring partners and proteges with a common set of needs/goals. This enables tweaking of program components before expanding the program to include more participants.

What we did: deliver the planned program

After defining and designing three distinctive mentoring programs for three distinctive groups of proteges, each program needed to be implemented or delivered. Because the Task Force representatives knew their own business unit needs/goals and participants, they were able to re-match the right mentor-protege partners for the right type of program.

Partners signed up to attend a 2-day **Mentoring for Results Partner Training**. We scheduled several optional 2-day trainings so partners could pick one they both could attend. Why train partners? Because this is the best way to produce multiple benefits. Very few partners know one another well before the training session. Our partner training provides a series of structured activities that enable partners to get to know one another and feel comfortable discussing real issues, so that actual mentoring occurs during the training session.

Using our **Protege Needs Inventory**, partners agree on needs to address and prioritize these into goals to be achieved. To enhance commitment and prevent problems, partners create a **Mentoring Agreement** by discussing and answering questions related to Expectations (e.g., Who will initiate meetings?), Concerns (e.g., What will you do if you don't have enough time to meet?), and Desired Benefits.

To learn how to work well together, partners compare their preferred mentoring styles (identified by answering our **Mentoring Style Indicator**), watch a video that demonstrates how to use all 4 Mentoring Styles in a flexible manner, and then practice this together to resolve a challenging issue for which the protege needs various kinds of mentor assistance. Developing and using Mentoring Style flexibility prevents partners from "getting stuck" overly using a preferred style (e.g. self-reliant proteges often reject the mentor's wise counsel, even when this is needed to be successful; 38% of the female proteges did this, and their careers derailed when their informal mentors stopped providing assistance, according to the well-know book, *Breaking the Glass Ceiling*).

Thus far during the training session, partners have engaged in a lot of discussion. Now, partners create a **Mentoring Action Plan** that converts talk into actions that produce desired outcomes. Research by CSX Transportation on the benefits gained by 30 groups of mentor-protege partners over a nine year period found that both mentors and their proteges in long-distance relationships reported the most benefits because they stuck to their Plan: they were prepared for meetings and actually met (via telephone, in person) when this was scheduled, instead of simply "doing lunch" or meeting in other casual ways.

Before this Training Activity: Nearly all of the 300 mentors were from the Netherlands or the UK (ex-pats), who came to this Shell Oil location (Miri, on the island of Borneo) to impart their expertise to local indigenous workers. Nearly all mentors functioned by employing a **Results-oriented Style** to direct less-experienced persons (including proteges) to produce better results. Many ex-pats thought this was their main function for being there. Nearly all of the 300 indigenous proteges functioned by employing a **Feeling-oriented Style**. They valued harmony and getting along with others because of their culture. They pretended to "go along to get along" with "bossy" ex-pats: they passively submitted publicly to ex-pat's strong directives, but then disagreed behind the scenes, often aggressively (this is called the *passive aggressive syndrome*).

The diagram shows that these two General Styles of Functioning are diagonal opposites. These "opposites" tend to clash unless they learn how to "style-shift." Indeed, "style-shifting" is necessary for working and relating better with each of your non-preferred Styles of Functioning. This is easier to do if you have 2 or 3 preferred Styles, because you already know something about "style-shifting" each time you use these preferred Styles.



Training we provided: To rectify this situation, mentoring partners participated in a series of Training Activities. First, each person answered our **General Style of Functioning Indicator** to identify his or her preferred Style. Then, we provided instruction on understanding the characteristics of each Style and contributions it can make. Next, we created groups of mentors and proteges such that all 4 preferred Styles were represented in each group. Each group was tasked with listing specific ways their preferred Style needed to change to work better with the other 3 Styles and listing how these 3 Styles needed to change to work better with their preferred Style (this is necessary for "style-shifting" to occur). Each group shared the two lists they had created – amidst much laughter because of the insights gained about actual situations where "Style clashes" had actually occurred. Finally, mentoring partners practiced "style-shifting" so they could work/relate better – to produce better results for proteges, mentors and the sponsoring organizations (Shell Oil's 12 Business Units in Miri).

To ensure ongoing delivery, we trained the 12 reps to provide our ***Mentoring for Results Partner Training*** for new groups. And, the coordinator continued to function much like a helicopter in the air (overseeing the big picture) and on the ground (helping reps handle local issues).

Because it was carefully defined, designed and delivered, these three Mentoring Programs continued to produce intended outcomes for the next 10 years – for three very different groups of proteges and for their business units.

Why utilize an Expert in Mentoring Program Development?

Over the past 20 years, there has been a proliferation of books (over 300) on ***Mentoring*** written by individuals at the five Levels below. Many of these books are based on *Dissertation Theses* – mostly focusing on informal mentoring (do-your-own-thing mentoring) – written by persons at the lowest two Levels. These “instant experts” are often hired to encourage more mentoring in organizations. Most of our clients over the past 20 years have hired us to enhance (fix, salvage, tweak, redesign) what these “instant experts” have created. The Shell Oil example above is one of the most ‘unsuccessful creations’ we’ve redesigned and rectified.

For more detailed descriptions of what we provide, see our Mentoring Books:

- ***Mentoring, Skill Coaching & Knowledge Solutions: Different Resolutions for Different Challenges*** (WA Gray, 2022).
- ***Enhance Your Mentoring Relationship & Benefits While Preventing Common Problems*** (WA Gray, 2023)
- ***Mentoring A to Z: 70 topics to grow your relationship*** (Marilynne Miles Gray, 2022; 2nd edition)

Level	Main Characteristics of a Mentoring Program Development Expert
<i>Expert</i>	Has at least 10 dedicated years focusing on a field (e.g., developing distinctive mentoring programs). Experience in field is broad and deep. Intuitively aware of important variables in any new situation. Able to use different paradigms and heuristics to solve problems quickly and creatively. Reflective practitioner who self-assesses what works/doesn’t. Engages in “forward” reasoning to solve a problem. Able to align the right processes needed to produce multiple outcomes (develop competencies/talent and reduce turnover while involving the diversified workforce). Typically, this person develops the Guiding Principles and the rules of engagement.
<i>Proficient</i>	Has at least 5 years in the field, with some varied experiences. Still “rule-bound” when solving problems. Becoming a reflective practitioner. Can plan and implement several different types of mentoring programs, each of which produces a desired outcome (talent development <u>or</u> retention, for example).
<i>Competent</i>	Has repeated experience doing the same thing. (e.g., can plan and implement one type of mentoring program – such as for orienting new hires better, but not for developing leadership competencies).
<i>Advanced Beginner</i>	Knows “about” mentoring for specific circumstances and has limited practical know-how. Likely to implement simplistic “do-your-own-thing” mentoring initiative than a more formal program with structured components that produce intended outcomes. Doesn’t feel responsible for producing outcomes.
<i>Novice</i>	Little or no direct practical experience or know-how. May have gathered information, read books or articles, but has no practical understanding based on actual experience.
The 5-level model above is based on several meta-analyses of other research on what it takes to become an Expert in a dedicated field of focus. See: Dreyfus, H. and Dreyfus, S. (2005). Expertise in real world contexts, <i>Organization Studies</i> , 26(5), 779-792.	

William A. Gray is the president of Mentoring Solutions located in Victoria, British Columbia, Canada. He has a PhD from the University of Texas, and nearly 40 years experience creating over 150 Formalized Mentoring Programs and Coaching Programs for different industry sectors. Contact him to find out how he has worked with Chevron, Shell, Exxon, BP, Mobile, Phillips, Pan Canadian Petroleum (now EnCana), Dow Chemical, Occidental Chemical and hundreds of companies in other industry sectors.