

B. THE FIRST SESSION

The first session can be the key to getting the mentoring relationship off to a good start although this is not always the case. It can take time to build a strong relationship of mutual trust.

A number of successful and experienced mentors have kindly provided the following suggestions and approaches, which should help you achieve strong relationships.

In this section we cover:

1. The first meeting – an ‘aide memoire’

2. Key questions

3. Example proforma for note taking

4. Levels of perspective

B.1 The First Meeting – an aide memoire

This section provides some key pointers on making the first session a success and also includes an aide memoire template. The first meeting is important as it can provide a firm foundation for the relationship. However, it often takes a few sessions to really develop some mentor/mentee chemistry so there is always an opportunity to build and evolve the relationship.

Context

This document provides some useful tips and guidance to help you prepare for the first mentor/mentee meeting.

Approach

The recommended approach is to prepare in advance and also share some relevant information in advance of the meeting - share an e mail/CV and a little bit about yourself... BEFORE THE FIRST MEETING.

Ideally the first meeting will be face to face in a neutral setting – cafe, office, WBS... whatever suits you both.

Guidance

- Find an area of commonality – humour, sport, music i.e. a common value, which may prove to be an initial corner stone for the relationship.
- As a mentor you need to leave your ego behind... this is not a business meeting.
- Most importantly; listen... listen... listen... to your mentee.
- Prepare some initial questions (see question bank in toolkit below in section B2)
- Typically explore 4 subjects or less depending on mentees needs and maybe agree to work on 1 or 2 of these for the next session.
- Takes notes (for your own benefit) and agree next steps/action. (Example meeting note template is in the toolkit at Section B3)
Note: Mentee should be encouraged to take their own notes - it isn't your role to provide the meeting notes and also the mentee writing notes is more likely to result in them taking ownership of the agreed actions.
- Capture the desired outcomes.
- Agree any actions.
- Agree subject of next meeting.

Initial Meeting Preparation

Aide memoire

1.	Introductory e-mail sent by Mentor	
2.	CV/e-mail received from Mentee	
3.	Meeting date & time agreed	
4.	Meeting venue agreed	
5.	Initial Questions prepared	
6.	Note template prepared	
7.	Mentor guidance notes reviewed	

B.2 Some Key Questions

*Key Questions for the opening session
(Based on the 'GROW model – see Toolkit section C for more information on this model)*

Goals - what do you want?

- What are you looking to get out of this mentoring relationship?
- What are your goals?
- If we were standing looking back a year from now, what would you hope to have got out of our sessions together?
- What are the three or four key areas that you would like to cover?
- Which of these is most important to you right now?
- If we addressed one of the areas today, which would have the biggest impact on you/your business?
- How will that take you towards your outcome?

Reality – what is happening now?

- Tell me about where you are now?
- What are some of the challenges/obstacles that you are facing today?
- What's stopping you?

Options – what could you do next?

- What options do you have?
- What upside/benefit; what downside/risk?
- What's the worst that could happen?
- What else could you do/what could you do differently?
- Who will be impacted/what does this mean for xxxx?

Will – What will you do next?

- What needs to happen to take this forward?
- What actions will you take?
- How will you measure success?
- What's your first step going to be?
- How committed are you on a scale of 1-10?
- How important is this to you?
- When will you take this action(s)?
- What will you hear, see, and feel when you have achieved it?

B.3 Mentoring Meeting Summary Sheet

Context

This document provides some short guidance on note taking and also includes a suggested 'notes template'.

Approach

The recommended approach is to take sufficient notes for you to keep track of your mentoring sessions and also enable you to gauge and monitor progress of your mentee.

You are not expected to take notes for the mentee - that is their job.

The notes are solely for you/your mentee's benefit and will not be required or shared with WBS, mentee's employer etc.

Guidance

- Note taking by the mentor is recommended best practice but is not mandatory.
- Mentee should be encouraged to take their own notes.
(Note: it isn't your role to provide the meeting notes and also the mentee writing notes is more likely to result in them taking ownership of the agreed actions)
- A template is provided but you can use your own template if you prefer.
- The notes are private between you & the mentee.
- The notes will not be shared with WBS or mentees employer or anyone else unless agreed by mentee and yourself.
- Be aware that under the Data Protection Act the mentee is entitled to see any notes, and so as a mentor you should avoid including things that you wouldn't want the mentee to see.

Template

A template to help in your note taking is on the next page...

Mentee:

Date of session:

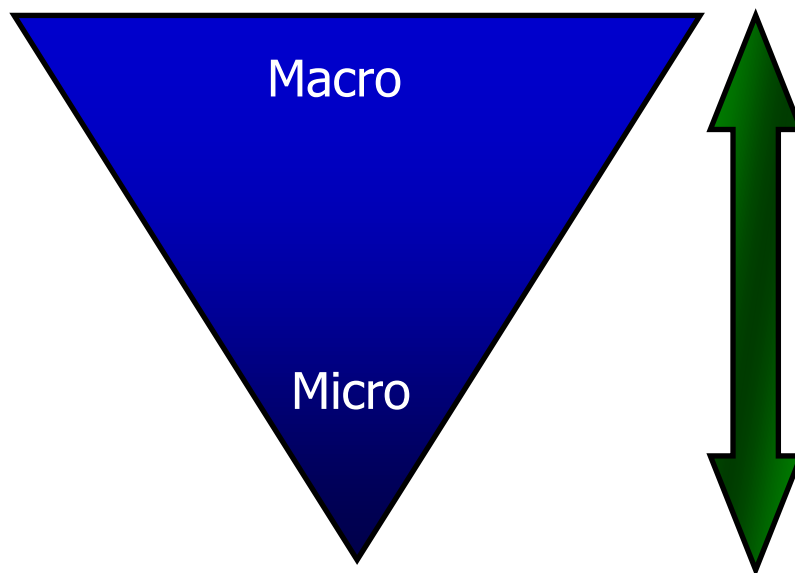
Preparation:
Models/Tools/Approaches Used:
Priorities Agreed:
Actions Agreed:
Outcomes:
Brief Summary of Session:
Length of Session:

B.4 Levels of Perspective

Macro to Micro

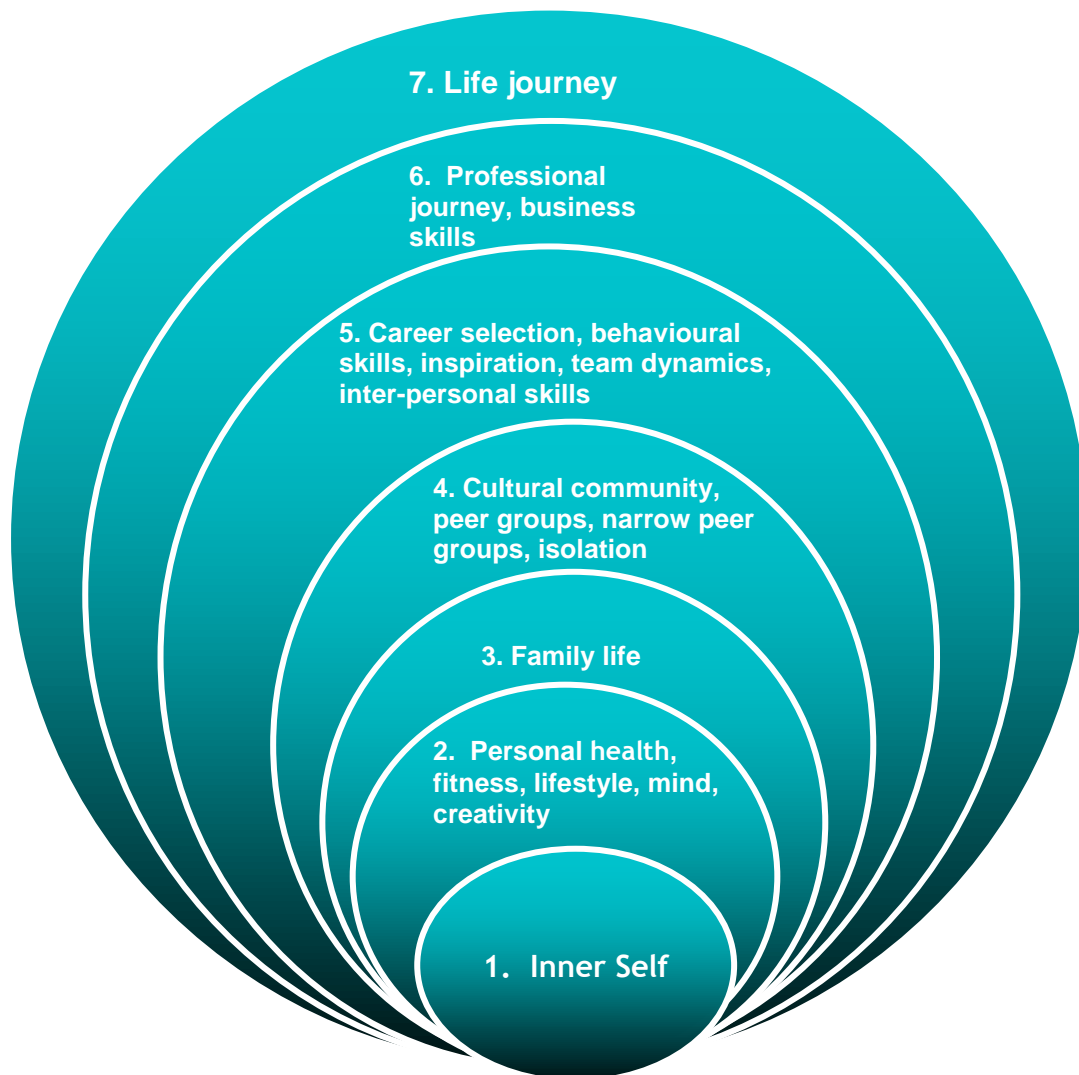
When viewing a mentor/mentee relationship, there are times when it is appropriate to take a macro viewpoint - an overview and likewise, there are times where it is more appropriate to consider issues at a micro level – seeking to examine a point of detail.

A flexible level of perspective is an important skill to be used within the relationship.



The following model indicates the seven potential levels of perspective relating to the individual mentee. Mentor involvement may be engaged at one or several of these levels.

My suggestion is to let the mentee share with you four areas for which they may wish to have support. The mentee will then influence the level of perspective and thus offer by invitation the level of intervention that is comfortable for them.



Respecting Boundaries

- Look at both the mentor's and mentee's personal boundaries.
- Find neutral territory in terms of meeting location, initial topics of conversation and subsequent communication.
- Ensure there are no conflicts of interest, either professionally or privately.

- Avoid becoming involved inappropriately:
 - Financial assistance.
 - Acting as a therapist or career advisor.
 - Helping current students with course work/assignments.

As a coach and mentor you are generally offering help around career, skills and personal development. Inevitably there may be some occasions where discussions cross over into a mentee's personal life. However, where you identify issues outside the scope of the mentoring relationship the mentee needs to be encouraged to take these up with the appropriate professional – counsellor, psychotherapist, GP etc.

Intensity of Intervention

- WBS offers a code of practice which outlines recommended timescales for contact and communication between mentor and mentee.
- The mentee's priorities may change over time and a degree of flexibility will be required from the mentor in response to this.
- Natural enthusiasm, on behalf of the mentor, to be involved with resolving possible problems or issues raised by the mentee is understandable but, it is for mentees to solve their own problems. Any involvement here by the mentor may lead to disappointment and could even be destructive within the relationship.
- It is also a natural process for the contact time between mentor and mentee to ebb and flow. In the early part of the relationship, communications may be fairly structured; it then may fall away for a period of time and be re-energised by either the mentor or the mentee when appropriate.

Different Priorities in the Relationship

The WBS mentoring programme is broad ranging and covers present day students through to very experienced members of the Alumni.

The stage of the individual mentee's career and life journey influences the points of perspective:

- Current WBS students:
 - Career direction. It is appropriate to listen to the concerns of the mentee, but then perhaps suggest that any career issues are better handled by the appropriate team within WBS.
 - The major thesis within the course will also be discussed. However, as with specific subject topics, listen, give a perspective, but avoid contributing to the actual work involved.
 - Cultural isolation can be a problem with students who are away from home for the first time. Having 'someone there', such as the mentor, is a great bonus.

- Business entrepreneur:
 - Validity of business model.
 - Management of cash flow.
 - Route to market is rarely understood at the beginnings of a business start-up.
 - Ownership of IPR.

- Distance learning:
 - Isolation.
 - Overwhelmed.
 - Cultural.

- Alumni:
 - Personal journey.
 - Professional.
 - Family.
 - Giving back.

As a mentor, you may be involved in facilitating your mentee through some big 'life decisions' for Alumni who might be at a different stage of their lives, when compared to current students.

Who has the Answers?

The answers to issues being raised by the mentee may inevitably come from a wide range of sources including:

- Mentor
- Mentee
- WBS
- Family
- Alumni network

As a mentor you are not expected to have all the answers!

Within the WBS Mentor population, there is a vast range of skills, personalities and opportunity for access to resource... the potential answers will be out there somewhere. Your Mentoring SteerCo member, the Alumni mentoring scheme administration team or the Mentors LinkedIn Group may all be useful entry points to finding what other expertise is available in the wider mentor community.

In terms of Mentor/Mentee perspective, while there may be a glorious opportunity for a valuable two way learning process and it is incredibly important for the *mentee to own and resolve their own issues*.