

eXPD8 Mentor Handbook

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1.0 Mentor Handbook

This handbook covers the fundamentals of becoming a successful mentor including how to establish a successful relationship with your mentee, how to structure the program and some useful forms to support both parties in getting the most from the program.

The handbook has been constructed with our eXPD8 Mentors in mind but it provides useful information for anyone looking to become a Mentor or for those interesting in developing a mentoring program.

1.1 Why do we have a mentoring scheme?

Our colleagues are our greatest asset. We believe that helping our colleagues to develop is fundamental to the growth of eXPD8.

We also believe that a mentoring program will increase individuals' engagement, add to overall job satisfaction, produce greater commitment to our business and show that we care about, and invest in, our colleagues.

A robust mentoring program is a cost-effective way to ensure that colleagues are engaged and empowered – we are contributing to the development of a fully involved, trained workforce.

1.2 Will I get anything from it?

You will hopefully get the satisfaction from helping others benefit from your experiences; as sharing your wisdom, knowledge, skills, successes and failures (!) will be hugely beneficial to our mentees. On top of that, mentoring can give you new skills and allow you the opportunity to develop your existing skills.

1.3 Why this Handbook?

We appreciate that some volunteers will have extensive mentoring experiences, whereas for others this may be their first experience of mentoring. This Handbook and the associated documentation are intended to give minimum guidance standards, along with, hopefully helpful information to get the relationship with your mentee started, and to ensure we all understand what we are trying to achieve with our mentoring program.

2.0 About Us

eXPD8 is a Bristol-based company providing high quality retail support services on behalf of many leading brands in numerous retailers throughout the UK. We've been in Bristol for over 14 years and are passionate about our award winning city.

Our Retail Support services include product merchandising, promotional set-ups, compliance audits, retail intelligence and much more. We have a skilled and motivated field workforce of over 1,800 people all over the UK who are ready to be briefed on the task in hand. Our central team in Bristol coordinate the activity and ensure our clients receive a first class service and real time results. Take a look at our infographic [here](#).

Whether it's grocery or cosmetics, home entertainment or toys, whether it's merchandising or information gathering, we have the people, process and technology to make it happen with ease.



We also have two sister companies that provide complimentary Retail Support services:



eXPD8 Analytics specialise in providing data analysis, insight and reporting to identify opportunities that improve performance. Whether you're a small business or a multinational, we'll work collaboratively with you to achieve your goals.



eXPD8 engage is a promotional and experiential field marketing agency that provides face to face retail support services to retailers, suppliers and manufacturers throughout the UK.

And we are a major recruiter of part-time, flexible work across the whole of the UK. Our roles suit a broad range of demographics from students, to parents, to the semi-retired and those who want a job to fit within their lifestyle.

Contacts:

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3.0 What is mentoring?

Mentoring describes a relationship supporting someone through a learning or developmental journey. It's about reflecting, encouraging and supporting the new or existing business owner to make the most of themselves and their career development.

Mentoring is about mutual trust and respect. It's a two way relationship - you both get the chance to learn new things. Don't think you're the only one getting something from this. You'll both further your personal development. You've probably got lots of life experiences that your mentor can learn from. It's also a great way for them to develop and improve communication and planning skills.

Every mentoring relationship is different, but each will present the opportunity for both mentor and mentee to learn from each other.

3.1 You and your mentee

As a mentor, you're the person who guides and supports your mentee. Your mentee is the person that is supported and encouraged to achieve their goals.

3.2 What should a mentor do?

A mentor is normally someone who has more entrepreneurial business experience and who acts as a trusted confidante over a flexible period of time. Mentoring is a closer and more meaningful relationship than is seen in coaching. A true mentoring relationship is a mutually beneficial learning experience where the mentor shares their personal knowledge and experiences and promotes a self-discovery approach. A mentor **should**:

- Provide an outside perspective on both the mentee and their needs
- Listen, confidentially, to the things that are worrying the mentee
- Help by sharing their own experience of both failures and successes
- Give friendly, unbiased support and guidance
- Provide honest and constructive feedback
- Be a sounding board for ideas
- Facilitate decision making by suggesting options based on personal experience
- Provide contacts and networks to further personal development
- Inspire the mentee to realise their potential
- Provide ongoing support and encouragement

3.3 What shouldn't a mentor do?

Mentoring is only one aspect of business support and therefore a mentor **will not** be expected to:

- Provide a training service
- Provide therapeutic interventions
- Sort out all problems
- Take the responsibility for making the mentee successful – the ultimate responsibility for that lies with the mentee themselves

You should be prepared to commit to at least two hours a month. We recommend that your mentoring relationship usually lasts for about twelve months - this is the time we think it takes to work with your mentee to be able to achieve their goals - it might be shorter or longer - whatever is best for you and your mentee.

3.4 Establishing a Successful Relationship with your Mentee

We recommend a 4 step process to help create an effective relationship:

1. Draw up a timetable in advance of regularly spaced meetings and establish a set of ground rules to which you will both abide
2. Maintain a session log, including session sheets and action plans which will act as the basis for ongoing discussion
3. Work towards developing a trusting relationship and establishing a good rapport with your mentee
4. Aim at maintaining the relationship for at least 12 sessions and adopt the attitude that over that period you can both benefit from it

Meetings need to follow a formal agenda, although this does not imply a rigid structure or approach. Effective mentoring meetings provide a sense of purpose and achievement. Meetings should be face to face where possible, with a face to face meeting at least once every two months.

When arranging a meeting with your mentee, please ensure this is in a suitable environment. Meetings should not take place at the mentees work environment. We recommend public places such as coffee shops and hotel meeting areas to run mentoring sessions with your mentee - whatever works best for both parties. **It is never a good idea to have mentoring sessions at a home address of either Mentor or Mentee.**

3.5 Early Exit

Although every effort will be made to ensure a close match between you and your mentee, sometimes this may still not work out. This may be no reflection on either party, and either party may finish the relationship, and exit the Mentoring Contract.

At this stage, the Mentor will be asked to complete the Early Exit Form, this will then be sent to us. Both parties will be contacted to confirm the situation and support if required another suitable Mentor/Mentee may be arranged for both parties going forward.

4.0 The mentoring process

4.1 The Introductory Meeting (First session)

The relationship that evolves over a period of time is crucial to the success of the mentoring journey. Although your mentee will control what they get out of the relationship you are the guardian of the relationship because of your experience and knowledge. The first meeting is vital because it will set the tone of the relationship which will, ideally, get off to a swift and productive start.

It's a good idea to have a think about your first meeting because it's really important. If you get off to a good start, you'll find everything else much easier.

4.2 Before the session

Before your first Mentoring Session, spend a little time making sure you have all the basic information you need about your mentee, including:

- Contact details
- Background
- Any special needs or circumstances
- Venue for the first meeting

So, to get started you could:

- Make yourselves comfortable, grab a tea or coffee and sit down and get to know each other
- Tell your mentee something about yourself; this could include information about both your professional and your personal life. Whatever feels right for you
- Explain why you got involved in the Mentor Program, what you think you might be doing and what you both might get out of it

Remember - if you don't hit it off straight away don't panic. It takes time to build any relationship and it will get easier the more you meet because you'll build up trust and get used to each other.

Again, if you're worried about anything after the first meeting just get in touch with us. We're here to provide you with all of the support you need at those early stages.

4.3 During the session

A Mentoring Agreement form is provided to cover expectations and aims, which needs to be signed by both parties

The first session is all about getting the relationship off to a good start by establishing some ground rules and acknowledging that the relationship is two-way. It's also the best time to agree what you hope to achieve and share your expectations of one another. You will need to mention confidentiality, responsibility, when you would like to meet and for how long, how you'll keep in touch to arrange other meetings and the best way to remind each other of your meeting.

As a 'starter for ten' we recommend you cover:

- Your mentee's ambitions and goals in relation to:
 - achievements so far and how to build on them
 - realistic expectations
 - scale of priorities
 - areas on which your mentee would find input most useful
 - any particular issues being faced or areas they want support with

And a few basic essentials:

- frequency of meetings
- decision about email and/or telephone contact
- discussing and signing an agreement
- confidentiality
- how you will record progress and issues/targets for further development
- confirmation of next meeting date and venue

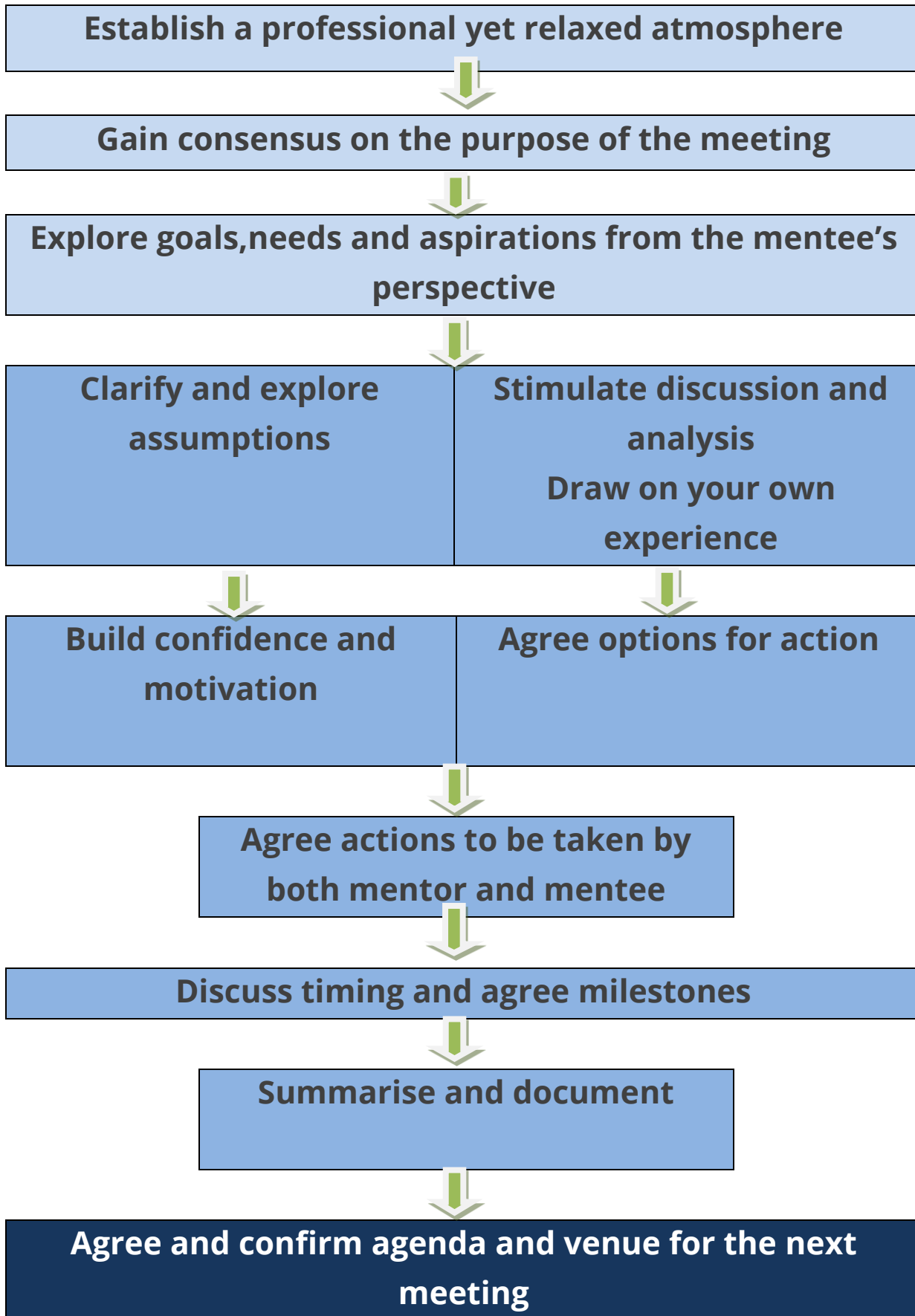
4.4 Subsequent sessions

Once you have made acquaintance with your mentee, your role as mentor will come into play. It is your responsibility to give frank and honest feedback with regard to your mentee's progress. By establishing a timetable of regularly spaced meetings, you will be in a position to review your mentee's success in achieving his / her objectives. Furthermore, through these discussions you will both be in a position to evaluate the effectiveness of the mentor/mentee relationship.

We expect contact to be at least monthly, with face-to-face meetings at least every two months, but at times you may need to meet more often if it is felt the support would be of benefit of the mentee. This will need to be agreed by both parties and will need to fall within the guidelines provided by respective employers, where a mentor or mentee is employed as part of their 'day job'.

As a Mentor, typically the duration of the relationship with your Mentee should not exceed 12 sessions (typically over 12 months), although if both parties believe that an extended relationship would be beneficial, then this can be agreed with the mentoring team.

4.5 Session overview



Based on Clutterbuck 'Everyone needs a Mentor' 2001

5.0 Monitoring and documentation

Both you and your mentee are at liberty to conduct the mentoring relationship as you see fit. However, to ensure the effectiveness of the process as a whole, we will expect all mentors and mentees to review and complete the following documentation as a minimum:

5.1 Mentoring Agreement

The Mentoring Agreement is not a legal document but demonstrates a commitment between you and your mentee to your mentoring relationship. This should be signed at your first mentoring session and sent to the Mentoring Co-ordinator.

5.2 Code of Conduct

The Code of Conduct sets out the professional standards required by us as a condition of mentor status. Before you begin your mentor relationship please review this document and make sure you understand and agree to adhere to its contents. Any reported breach of the code of conduct will be investigated by your Mentoring Manager.

5.3 Mentor Sessions Log

The Mentor Sessions Log is used to track the relationship between the mentor and the mentee for each session. It is simply a log to verify that meetings are being held. After a session is completed, this should be signed and a copy sent to the Mentoring Co-ordinator, so the mentoring session can be logged.

5.4 Mentoring Session Sheet

The Mentoring Session Sheet is a vital part of the process for the following reasons:-

- It is the only written record of what the mentee has learnt and achieved over the specified period. It will have been validated as a true record by being counter-signed by you as the mentor.
- It forms a basis of discussion and comment during your meetings with the mentee.
- It will act as a reference point for later use in the mentee's journey

5.5 Mentoring Relationship Outcome Form

The Mentoring Relationship Evaluation Form will be issued to your mentee following the successful conclusion of the mentoring relationship. It is used to review the success of the relationship.

5.6 Early Exit Form

The Early Exit Form is issued if a mentoring relationship ends before the conclusion of the recommended 12 sessions.

6.0 Boundaries

All relationships need boundaries (even though you might not have thought about them) and a mentoring relationship is no different. It's down to you both to be consistent and respectful. You should think about:

6.1 Time - mentoring works best when you've talked about how many hours you'll undertake and when it's best to meet. That way, you're both clear about timings.

6.2 Place - we recommend that you meet in public places, such as a coffee shop or hotel meeting area. It's our policy that you shouldn't meet at each other's homes. If your discussions are likely to be of a sensitive nature, arrange to meet somewhere where you will not be overheard and therefore can speak openly.

6.3 Getting in touch - it's up to you both to decide how it's best to keep in touch. Let your mentee know which number or email address is easiest to get hold of you on. Don't forget to chat about which times you'd both prefer to be contacted.

6.4 Money - don't feel that you have to pay for food or drinks for your mentee. Do not accept gifts from your mentee. You should also never ask for payment for your mentoring services. Entering into a financial arrangement is outside of the boundaries of this mentoring relationship.

If your mentee is behaving inappropriately or something else crops up that you're unsure about, then give your Mentor Manager or our Mentor Co-ordinator a call. We're here to help.

7.0 Confidentiality

It's really important that you respect each other's confidentiality. Remember that anything you talk about when you meet up is between the two of you so you shouldn't talk about it to someone else. But, legally, you should report any criminal conduct or possible harassment or bullying.

Confidentiality - four things to think about:

Concerns - if you've got any, chat to the Mentor Manager

Secrets - don't promise to keep secrets. Make that clear from the beginning and remember to ask your mentee if situations arise that may involve you sharing confidential information with anyone else.

Information - keep any information about your mentee, like a phone number, somewhere secure. Do not share any financial details.

You - confidentiality works both ways. Be aware of which personal areas of your life you're prepared to share with your mentee.

8.0 How do I know if I'm being a good mentor?

You might wonder before you start if you'll be any good at it. Don't worry, remember, you don't need to be a business expert to be a good mentor. You just need to be patient, open-minded, good at listening, positive and, of course, enthusiastic.

Unfortunately, there's not a test that can tell you if you're getting it right, apart from your mentee telling you that you are. You are probably getting things right if:

- Your mentee is meeting up with you (that might sound silly but if they didn't want to they wouldn't turn up)
- You have good rapport
- You feel like your mentee has opened up about their goals, objectives and challenges
- Your mentee has learned new things from your sessions
- You're really listening to them (not just pretending to)
- Your mentee appears to be developing both personal and business skills

8.1 Is it working?

Don't worry if meeting some of the goals seems to be going slowly. This doesn't mean you're not a good mentor. Things take time; often it takes a while before you see a change. Concentrate on the little things and remember they can make a big difference.

If things don't seem to be going too well, speak to your Mentor Manager or our Mentor Co-ordinator and we'll see how we can help. You might want to try:

- Calling your mentee before meetings to confirm them (if it's a case of missing sessions)
- Reviewing your initial plan to see if you can agree more tangible or realistic goals
-

8.2 Half-Year Review

At the 6-month stage of the relationship, you should undertake a review of progress to date. This should give an opportunity to feedback any issues, both with your relationship, but also, if necessary, to the mentoring team. It should be used to celebrate your successes to date and set the expectations for the remainder of the relationship.

9.0 End of Relationship

There will be a time when the relationship will begin to draw to an end. At this point you must both 'let go' so that the mentee can maintain their independence.

It will then become the responsibility of the mentee to put what they have learnt into practice. Although the two of you will probably continue to have some form of interaction, it should be on a more casual basis, where you consider each other as equals.

Let your Mentor Manager know when you've arranged your last session so that we can arrange a final review of both you and your mentee's experience.

Here are some tips for successfully ending your mentoring relationship:

9.1 Fixing a date for your last meeting - have a chat to your mentee beforehand and decide on a date. Remind each other of the date of the last session in the meeting before this so that you can prepare for it.

9.2 Other ways to support - You might like to encourage your mentee to look at ways that they can continue their development.

9.3 Celebrating your success - have a look back at the goals you set when you first met - you can pat yourselves on the back when you see how far you've come.

9.4 Saying goodbye - imagine how you can end the session on a positive note so it's not awkward. You could have a chat about the thing you most enjoyed, something you'll remember or the most important things you've learned.

9.5 Evaluating - don't forget to complete your final session evaluation form. It shouldn't take too long and it's really helpful to see how you got on and for us to identify any improvements we can make to the mentoring journey.

The Mentee will have a chance to review their progress at this point and will need to complete the Mentoring Relationship Outcome Form, which will then show the progress the mentee has travelled over the period of the mentoring relationship.

The Mentor – Mentee Relationship

Here are some general guidelines and tips describing the mentor-mentee relationship – Although the roles, responsibilities and outcomes may vary just as individuals and situations may vary.

For a successful mentor-mentee relationship, both parties need to be engaged, flexible and authentic, and there must be reciprocity.

MENTOR ROLES, RESPONSIBILITIES & BENEFITS:	MENTEE ROLES, RESPONSIBILITIES & BENEFITS:
<p>The mentor’s role is to listen, guide and help shape the professional growth and learning of the mentee and to serve as a positive role model.</p>	<p>The mentee’s role is to seek guidance, direction and constructive feedback on their professional development and career goals.</p>
<p><i>Mentor responsibilities:</i></p> <ul style="list-style-type: none"> • Shares information about background, skills and interests • Listens actively • Is a positive role model for the mentee • Shows mentee how they might be able to help • Helps mentee set career goals • Provides encouragement for building self-confidence & self-esteem • Offers mentee constructive and meaningful advice & feedback • Celebrates milestones & achievements with mentee • Advises mentee on workplace expectations • Maintains confidentiality at all times 	<p><i>Mentee responsibilities:</i></p> <ul style="list-style-type: none"> • Takes responsibility for keeping in regular contact with the mentor and actively participates in the relationship • Assesses learning and developmental needs, values and short and long-term career goals • Develops a plan with the mentor for achieving their goals and targets • Follows through on commitments • Respects the mentor’s time • Openly shares successes and failures • Is receptive to feedback • Takes advantage of opportunities presented by the mentor • Maintains confidentiality at all times
<p><i>Benefits of mentoring for a mentor:</i></p> <ul style="list-style-type: none"> • Demonstrates expertise and shares knowledge • Opportunity to build leadership skills • Enhances skills in listening and coaching • Contributes to the professional development of the mentee • Gives back to the community 	<p><i>Benefits of mentoring for a mentee:</i></p> <ul style="list-style-type: none"> • Assistance in defining career goals and development • Develops and meaningful professional relationship with the mentor • Increases professional network • Gains knowledge of workplace expectations • Builds self-advocacy skills and the confidence to be successful • Gains communication skills

Mentoring Agreement Form

We are both voluntarily entering into this partnership. We wish this to be a rewarding experience, spending most of our time discussing issue resolution and developmental activities. We agree that...

1. The mentoring relationship will last for _____ months. This period will be evaluated every three to six months and will end by amicable agreement once we have achieved as much as possible.
2. We will meet at least once every _____ weeks. Meeting times, once agreed, should not be cancelled unless this is unavoidable. At the end of each meeting we will agree a date for the next meeting.
3. Each meeting will last a minimum of _____ minutes and a maximum of _____ minutes.
4. In between meetings we will contact each other by telephone/email no more than once every - _____ weeks/days.
5. The initial aims of the partnership are to give advice and guidance on issue resolution and development. These will include (but are not restricted to) the following:
 - a)
 - b)
 - c)
6. We agree to keep the content of these meetings confidential. Any disclosures will only be with the agreement of both parties
7. The mentor agrees to be honest and provide constructive feedback to the mentee. The mentee agrees to be open to the feedback.

Date: _____

Mentor's signature: _____

Mentee's signature: _____

Date for Review: _____

Mentor Code of Conduct

Scope

A mentor helps the mentee to weigh up situation, through a process of reflection, questions, challenge & feedback, allowing the mentee to come to a decision themselves.

The mentor will conduct themselves with dignity and will act in a way which respects diversity and promotes equal opportunities.

Mentoring Code

- The mentor's role is to respond to the mentee's needs and agenda – it is not to impose their own agenda
- Mentors will agree with the mentee how they wish the relationship to work, adopting the most appropriate levels of confidentiality
- Mentors and mentees will respect each other's time and other responsibilities, ensuring they do not impose what is beyond reasonable
- The mentor will ensure the mentee accepts increasing responsibility for managing the relationship – the mentor will empower them to do so and will promote the mentee's autonomy
- The mentor must ensure guidance is given on a practical, not emotional level
- Either party may dissolve the relationship at any time
- The mentor will not intrude into areas the mentee wishes to keep private until invited to do so. They should, however, help the mentee to recognise how other issues may relate to these areas
- Mentors will be open and truthful with themselves and their mentee
- Mentors must avoid creating a dependency in the relationship
- The mentoring relationship should not be exploitative in any way, neither should it be open to misinterpretation
- Mentors would never work beyond the bounds of their capability, experience and expertise to the point where they do not feel confident in providing the mentee with proper support. Where appropriate, mentors should seek advice or refer mentees to another point of contact
- Confidentiality remains paramount at all times. At no time will a mentor disclose any part of the relationship to any person whatsoever without the explicit consent of the mentee. Any notes or records of mentoring sessions shall remain the property of the mentee, although may, for convenience, be retained by the mentor
- Mentors have a responsibility to highlight any ethical issues that may arise during the relationship, at the earliest opportunity
- Mentors should not attempt to do the mentees job for them – the mentee has the ability and the potential, it is the mentor's job to help bring out the best in them and to help them realise it

Mentoring Session Sheet

Mentor's Name

Mentee's Name

Meeting Date

Actions / Progress from issues identified at last meeting:

-
-
-
-
-
-
-

Actions agreed to be completed prior to next meeting:

-
-
-
-
-
-
-

**Next Meeting
Date**

Mentoring Session Log

**Mentor's
Name**

--

**Mentee's
Name**

--

Session 1

Date		Venue	
Signed Mentor		Signed Mentee	

Session 2

Date		Venue	
Signed Mentor		Signed Mentee	

Session 3

Date		Venue	
Signed Mentor		Signed Mentee	

Session 4

Date		Venue	
Signed Mentor		Signed Mentee	

Session 5

Date		Venue	
Signed Mentor		Signed Mentee	

Session 6

Date		Venue	
Signed Mentor		Signed Mentee	

Session 7

Date		Venue	
Signed Mentor		Signed Mentee	

Session 8

Date		Venue	
Signed Mentor		Signed Mentee	

Session 9

Date		Venue	
Signed Mentor		Signed Mentee	

Session 10

Date		Venue	
Signed Mentor		Signed Mentee	

Session 11

Date		Venue	
Signed Mentor		Signed Mentee	

Session 12

Date		Venue	
Signed Mentor		Signed Mentee	

Program Completed - Any ongoing action following Mentoring Process: