



**IBTTA
MENTORSHIP
REFERENCE/TOOLKIT**



CONNECT

- Phone or Zoom for initial introduction
- Share resumes to discuss backgrounds
- Establish goals with a mentorship plan

GUIDE

- Use mentor plan as a roadmap
- Develop a professional growth plan
- Attend virtual workshops and discuss

MEASURE

- Obtain Protégé Feedback
- Establish S.M.A.R.T. Goals
- Track Goal Attainment



CONNECT

Think about how you can help them as their mentor

TOOLKIT REFERENCES

Sharing Activities

- 1) Share resumes to get the ball rolling; ask questions about each others backgrounds and previous jobs/roles.
- 2) Share five things you both like about your job and five things you don't like.
- 3) List three most important strengths that you possess, and three strengths you'd like to have.
- 4) Which of these strengths do you want to work on most?
- 5) What are your hobbies or interests?
- 6) What is your favorite book? Why?
- 7) How would you describe yourself? - Outgoing, quiet, social, happy, etc.

What's Your Plan?

- 1) Discuss what Protégé would like to accomplish and think about a plan to turn it into action. The plan can be as short or long term as you would like.
- 2) If your Protégé has an interest in having a certain kind of job some day or to acquire a certain skill, use open ended questions to help them think through what steps need to be accomplished along the way towards realizing their goal.
- 3) Spend time talking about Time Management Skills. Make a list for the future of some goals




Think of ways to guide goal setting

TOOLKIT REFERENCES

Activities

- 1) Using what you've learned in step one CONNECT, formalize a plan that will be your guide for this relationship
- 2) Develop a professional growth plan
- 3) Attend virtual workshops and discuss what you heard/learned
- 4) Participate in weekly Café IBTTA to learn about industry Thought Leaders.

What's your plan

- 1) An example Mentoring Plan is [HERE](#) *
 - a. You can use a mentor plan as a roadmap to define and track goals and progress.

* Thanks to Shannon Swank at PlusPass for this document!



MEASURE

Think about continuous improvement and measurement of the mentorship process

TOOLKIT REFERENCES

Activity

- 1) Obtain Protégé Feedback
- 2) Review and ensure ongoing goals are S.M.A.R.T.
- 3) Track Goal Attainment

What's Your Plan?

- 1) Discuss next steps – continue with each other as Mentor and Protégé? Talk about opportunity to change up mentors if that is advantageous for Protégé.
- 2) Talk about implementation plan for S.M.A.R.T goals – one by one
- 3) Plan for an annual meet up if possible, at an IBTTA event or at least via phone/web to stay in touch

MENTORING GUIDLINES

MENTORS AND PROTÉGÉS: AS A PARTICIPANT IN IBTTA'S MENTORING PROGRAM, I AGREE TO:

- Treat others with respect
- Put an honest effort and commit sufficient time toward each mentoring relationship
- Not promote goods or services nor accept fees or commissions (this is not a sales call)
- Recognize the diversity of the IBTTA community and respect the variety of cultural norms, beliefs, practices, and values it *contains*

MENTORS: AS A MENTOR WITHIN THE PROGRAM, I AGREE TO:

- Support the goals of my protégé
- Model and promote the highest ethical standards
- Maintain the confidentiality of all ideas, products, or materials shared by my protégé
- Avoid the intent or appearance of unethical or compromising practice in relationships, actions, and communications
- Serve as a positive role model, friend, coach, advisor, networker, and career counselor

PROTOGEES: AS A PROTÉGÉ WITHIN THE PROGRAM, I AGREE TO:

- Learn about my mentor in advance and be able to articulate how they might help me by sharing their experience
- Create relevant, specific, detailed, and clear mentoring goals related to career growth and leadership skills (this is not for technical training)
- Communicate regularly and openly with my mentor
- Keep commitments and complete any tasks agreed upon by my mentor and myself
- Hold all sensitive information provided through my mentoring relationship in strict confidence

TOOLKIT REFERENCES

1. Guidelines for mentors and mentees

<https://icrs.info/cpd/mentoring/guidelines#What%20makes%20a%20successful%20mentoring%20relationship?>

2. How to be a Great Mentor

https://www.youtube.com/watch?v=G3q8kEn_nsg

3. How to be a Great Mentee (Protégé)

<https://www.youtube.com/watch?v=JzqyKn0IF00>

