

# Creating an Effective Mentor/Coaching Program

## 7-Steps Process

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## Step One: What Are Your Goals?

In today's tough economy, training budgets have been cut and formal training programs are probably reduced. One way to maximize the budget, train and mentor people on the job and to create leadership is through the implementation of a coaching or mentor program. The first step in the creation and implementation of a coaching program is to determine your goals. But before taking that step, it's a good idea to understand the subtle differences between coaching and mentoring.

A mentoring relationship focuses on the person being mentored, as well as his or her career and goals. The mentor may give advice on how to approach certain situations, but that advice is generally in favor of the person being mentored, sometimes referred to as a protégés. Coaching, on the other hand, focuses on a specific result or goal, such as job performance. The coach may also give advice on how to reach that goal, but the ultimate result is the goal itself. In this sense, coaching is rather impartial, that is, not biased toward an individual. Either coaching or mentoring can be formal or informal, so the decision on which program you want to use is based on the organization and its culture.

Regardless of which program you choose, you must set forth the goals of the program before trying to implement it. First, as we have discussed, you should decide if the program is to be formal or informal. In a formal program, you will probably have measurements, evaluations, scheduled meetings, and possibly even payment for a mentor or coach's service to the program. The selection of mentors and coaches may also be a formal process, using pre-determined criteria. An informal program can usually occur through showing people how to coach or mentor and then letting the process unfold organically.

Next, it's necessary to look at the goal of the program. During this time, you may find that

the differences between coaching and mentoring come into play. For example, if your goals turn out to be measurable or based on jobs, then you've pretty much determined by elimination that the program will be coaching. In relation to goals, think about what the organization wants to accomplish. Is the program meant to take the place of formal training, that is, to train people for performance on the job? Does the organization need to increase productivity? Or perhaps one particular area of the organization needs to be lifted to a new level, such as sales or marketing. Do you want to create a leadership pool or "bench" without going through a formal training program? Think about all of the things you could accomplish through a coaching program and begin to list your goals. Once you do this, you'll be better able to proceed and implement the program.

The final step in planning and creating goals is to look at a time line. For less formal, organic programs, you may just want to see what happens without creating a formal time line. But before you make that determination, think about the organization and where it is today. Is the idea of a coaching or mentoring program temporary, that is, to get the organization through a bad cycle or a downturn? For that matter, is the program going into place to help out in a period of rapid growth or expansion? Perhaps you see the program as a permanent addition to the development of the organization, where coaches are selected, they "create" new coaches, and these new coaches continue the process down the line. Whatever time line you decide, it is necessary to have an idea before you move on to the design and implementation of a coaching or mentoring program.

Remember that like any development program, a coaching or mentoring program can be a constantly changing and ever-developing part of the organization. So it's perfectly acceptable to make changes as you go along or when you stop to reassess the success of the program. Now

that you've determined the type of program, its goals, and its time lines, you're ready to move on to the overall design of the program itself.

## Step Two: Design the Program

A coaching or mentoring program is an important way for an organization to take an interest in its associates, train them, and let them know that there is someone out there to help them. In our first discussion about creating a program, you learned that you have to define whether the program will be coaching or mentoring, as well as define the goals of the program.

The next step is the design of the program, so let's discuss a couple of general tips about program design before we go to the details. Treat your coaching and mentoring program as you would a training or leadership development program, that is, give it the same "loving care" and attention to detail as you would a new flagship educational program. The second tip is to spend adequate time in this design phase in order to create the best program possible. Don't sacrifice quality for a few extra days or weeks. Let's discuss design steps. You may be surprised - some of these steps are exactly like designing a training program.

First, whether the program is formal or informal, create objectives based on your goals. While developing these objectives, think about them in terms of training objectives. What is it that you want the "coachee" or protégés to be able to do during a certain time frame in the program? The objectives could be as simple as learning more about the management function at your organization or even getting to know a senior person as a mentor.

Whatever your objectives, write them down and "formalize" them so that you can evaluate your success in the future. Along the same lines, create a mission statement for the program.

This statement will serve two purposes: one, it will show everyone in the organization what the

mission of the coaching program is (and hopefully garner some interest), and two, the mission statement will give the coaches and mentors something to focus on as they move forward.

Next, take the time to obtain the buy-in of key stakeholders and executives. Just as a training program does not have much chance of success if it's not supported by a money-holder or executive, your coaching or mentoring program may not survive if it lacks a senior champion. Use your carefully crafted goals, objectives, and mission statement to show the executive the benefits to the organization. Frame those benefits in terms of the goals, i.e. higher production; lower training costs, or higher retention. If the executive you're reaching out to has a financial stake, consider asking him or her to offer bonus pay for coaches or mentors. There is one potential pitfall with compensation for coaches: some coaches may take the responsibility simply to earn extra money. When you move on to evaluation and selection criteria, be sure to keep this possible problem in mind in order to "weed out" undesirable coaches.

Take the time to develop measurement and evaluation for your program, as well. Again, use your goals and determine how you're going to define the success of the program as a whole as well as down to each individual coach and protégés. Remember that measurements and evaluations will go both ways, that is, both coaches and protégés should be allowed to evaluate their experience, their coach or protégés, and their success. Don't forget to determine your selection process for both coaches and protégés: create a criterion that is easy to understand and compare to a person's performance, personality, or both. Along with this, determine schedules for meetings and schedules of payments to coaches (if this is something your organization has decided to do).

As you move forward, begin to design a training program for mentors or coaches. Don't let the decision to make a program formal or informal get in the way of showing mentors and coaches how to perform that function. Use the objectives you've come up with and create a training program. The training could be a simple web seminar, a Power Point, or a full blown, in-person workshop. Start with basics, such as the definitions of coaching and mentoring, and move to the specifics of your particular program such as measurements and evaluations. Once you've gone through the first few steps of design, the actual creation of the formal program will be easy. Again, take your time, plan the design, and then get to it.

After you've designed the program, it's time to plan the implementation. In our next step, you'll figure out how to make the coaching or mentoring program happen.

### **Step Three: Implementation**

Your coaching or mentoring program is now well designed. You've spent time on the details and the program has taken shape. Don't jeopardize your success by forgetting to carefully plan the implementation of the program. In this step, you'll need to look at marketing, selection, training, and scheduling. You may have planned some of this in your design stage, but let's discuss some general tips in each of these areas to ensure a smooth rollout.

One of the most important pieces of implementation is the marketing of a program. Just as your organization markets its products and services to its clients, you must market your coaching program to your clients. And, as with other developmental programs, the sell is not always easy. First, determine who your target audience will be for both coaches and protégés. If the entire organization makes the cut, focus your marketing on the benefits for the organization, the coaches, and the protégés.

Consider a training program rollout as a comparison.

The quickest way to sink a new program is to simply put it out there and tell the organization that it was needed and ordered. Think about your coaching program in the same marketing terms. Why is the organization adopting the program? What can the organization expect to gain from the program? What can coaches, mentors, and protégés gain from taking the time to become a part of the program? Use your mission statement and objectives to frame and develop your marketing.

The marketing may get the attention of prospective coaches and mentors, and even participants. But when they find out the level of commitment they may have to have, a few might fall out. This is a good problem to have, but be sure that your training effectively explains the program and expands on the benefits that are mentioned in the marketing. Your training should not focus solely on the definition of mentoring and the steps to take to become a coach. Your training should, in effect, create a mentoring and coaching environment for mentors and coaches.

It should be interactive, focus on benefits, and truly convince the people involved that they've made a good decision both personally and professionally. Choose your instructors wisely, as well. Perhaps now is the time to consider using "guest" instructors, that is, organizational members who are not part of the training and development staff. Successful managers, that is, those that have the respect of peers, direct reports, and cross-functional areas, sometimes make the best coaches. For this reason, these people may make the best coach-instructors.

When you begin your selection process, which is a big part of implementation, be certain that criteria for becoming a coach or mentor as well as that of becoming a protégés are clear, measurable, and non-biased. Just as Human Resources must make these types of selections

when choosing job candidates, you must make solid selections of both coaches and protégés. Don't get caught in the trap of trying to find "warm bodies" or simply selecting popular managers. Use the criteria, goals, and measurements you've spent time developing in order to choose the right people for the program. And be certain that any decisions can be backed up factually. When you pay this close attention to your selection process, you'll be steps ahead of the curve when the program first rolls out.

Finally, think about the scheduling aspect of the coaching or mentoring program. Aside from training coaches or mentors, are you going to require regular meetings of coaches and protégés, as well as separate groups of coaches and protégés? If your program is more informal, decide if business-hours meetings are called for. In cases such as these, you may have to confine meetings of informal mentors and coaches to after- or before-hours times. On the other hand, if the coaching program is formal and expected to be part of an overall development path or curriculum, consider how scheduling meetings should be handled. The key here is to make plans for scheduling before you start doing it. This way, your implementation will be clean from start to finish.

After the implementation, let your program run for a set amount of time. You can decide what time frame is appropriate, as well. After that time frame runs, it will be necessary to go back and measure effectiveness.

#### **Step Four: Measurement**

You've spent time and effort on creating and designing your mentoring or coaching program. You've also got the "buy-in" of key stakeholders within the organization. Although these are important steps, it is equally important to ensure that the program is effective - and that it maintains its effectiveness. As we will discuss in the future, your ultimate goal with a coaching or mentoring program is to make it a

permanent part of the organization's culture. To make that happen, you must take a few major steps beyond the implementation of the program. The next step, then, is to measure effectiveness. Let's look at some great ways to do this.

First, it's important to remember that measuring effectiveness is not a one-time thing. You must continue to measure the effectiveness of your program on a regular basis, just as you would a regular training and development program. Whether your program is formal or informal, the first thing to do in preparation for measurement is to revisit your original goals, objectives, and mission. From these items, you can formulate an evaluation. If your program is informal, take the goals of the program to formulate interview questions to be posed to both coaches and mentors and protégés.

The overall goal of an informal interview is to find out exactly how the program has affected the lives of both the coaches and the protégés. You'll want to find out if they have achieved advancement professionally, personally, or both. You'll need to discover if the program reaches beyond the office environment. And, you'll want to find out if the program is meeting your original goals.

For a formal program, consider creating a formal evaluation using your goals and mission. Think about how you would evaluate a training program in the lower and middle levels of Fitzpatrick's levels of evaluation. Write a separate evaluation for coaches and for protégés so that you can compare both back to your original goals. Make the evaluation a formal part of the program, that is, send it out via email or inter-office mail and request a response within a certain amount of time. If program members fail to respond, give them a friendly reminder. Also inform them that their responses are completely confidential and that the goal of the evaluation is to make the program better for them. You'll learn quite a bit

from a formal evaluation, especially when you can put numbers and responses in comparison with your original goals.

Evaluating effectiveness doesn't have to stop at interviews and paper-based evaluations. Consider evaluating the people who work with coaches and protégés, as well as their managers and supervisors. This way, you'll get an overall picture of how the program is impacting others as well as the direct participants.

Another way to evaluate is to find out how the program is perceived throughout the organization. Again, this could be done the same way regardless of whether the program is formal or informal. Ask organizational members if they've heard of the program, if they know anyone who is involved with it, and if they've seen a difference in how the organization is functioning. While you're looking at perceptions, go back to that executive sponsor or key stakeholder and discover what he or she perceives about the coaching or mentoring program. Although executives may be removed from the everyday life at the organization, anything they've heard, whether good or bad, is important news to you and your coaching program.

Another way to measure your program is to do some research and benchmark it against similar programs at similar organizations. You may have a formal or informal network of organizational development professionals, so that is a good place to start. Find out what kind of results those organizations have had with coaching and mentoring programs, on both an informal and formal basis. Take time to do some Internet research on coaching and mentoring and decide if any of the organizations you find are worth contacting. You may hear some good ideas for changes going forward, as well as some encouragement that your program is working well.

The major idea to keep in mind about measuring the effectiveness of your program is

to keep the evaluation going at regular intervals. If you get one good evaluation, don't stop there. As we will discuss, your program is a growing and changing part of your organization and should be treated as such. Now that you've evaluated, it's time to move on to the changes you'll need to make.

### **Step Five: Changing Your Program**

Most organizational development professionals know that evaluation of any program can lead to changes. And most of us know that change can be good and also that change can be rather difficult. When it comes to your coaching or mentoring program, you must move forward with the changes you've discovered in your evaluation, regardless of whether they are great changes or rather difficult changes. The best way to maintain a good perception, or build one, within the organization is to show that the program can be tailored to fit the current situation. Now is the time to take a close look at your evaluation and determine the changes that need to be made.

First, take a look at the kind of program you have in place. In our first discussion, we talked about the differences between coaching and mentoring programs, as well as the differences between formal and informal programs. Have you discovered that an informal mentoring program just didn't come together like you thought it would? If so, consider moving to a more formal arrangement. What if your program has achieved results but only on a small scale? This is another reason to consider going from formal to informal. Did mentoring miss the mark, that is, did informal mentoring have a less-than-adequate impact on the organization as far as productivity, management style, or other numbers? If so, think about going to a coaching program that has goals centered on the organization.

Another way to look for changes is to revisit the training and pay situation in your program. If an informal program hasn't quite lived up to

expectation, consider implementing a formal training program for coaches or mentors. On the flip side, perhaps coaches and mentors felt a bit restricted by the formal training and formal rules. Could that be a sign to move the program in a more informal direction? If your organization is paying mentors and coaches, look for signs that this has or hasn't worked. If protégés reported that their coach or mentor was less than interested in their progress, you may have picked up coaches that were more interested in getting paid than in helping their peers and organization. On the other hand, if mentors lacked motivation after a while, a pay program could be the proper motivating factor. And keep in mind that incentive programs for coaches and mentors don't always have to take the form of extra money on the paycheck. These incentives could be time off, gift certificates, special awards, or perhaps just a monthly luncheon.

As you're considering change, look at the people in the program, starting with coaches or mentors. One of the most obvious results of an evaluation is going to be the evaluation of coaches, mentors, and protégés. If coaches have more than one protégés, look at the trend from the evaluation you've created. A coach or mentor with lackluster performance on more than one protégés may be the wrong pick for the program. The same goes with protégés, though. A protégés who is resentful of the program or thinks he or she would be better suited as a coach may not have the right attitude to be included in the program. The hardest part of making change in the area of human resources in your program is just that: you may be adding or removing people from the program due to what you've discovered in your evaluation. The key point here is to move forward without fear - after all, the program must continue to improve and coaches, mentors, and protégés should be top performers within the confines of the program.

As you review your measurements in an effort to look for ways to change, take a close look at

your original goals. Are your goals reachable and effective, or did you over- or under-write the goals? Has the organization gone through change that would necessitate a change to the goals of the program itself? This is another area where you must overcome your fear and make the changes that you feel are necessary, especially when you have a fact-based evaluation to back it up. A final way to make changes is to ask the mentors, coaches, and protégés for help. They have evaluated the program and may have given you some ideas as to how to change it. Allow these groups to help you make changes.

The most important thing to remember when making changes to your program is to go ahead and make them. The change may be difficult, but it will strengthen your program in the long run. Once you finish making changes, it's time to get creative and look for ways to expand.

### **Step Six: Look For Ways to Expand**

The coaching or mentoring program you've created is up and running, you've evaluated, and you've made changes. At this point, you're probably seeing the successes of the program and would like to help others in the organization achieve those successes. Don't be afraid to look for ways to expand your coaching or mentoring program. Here are some ways to get more people interested and to expand the reach of your successful program.

First, consider incentive for coaches. If you've already implemented incentives for coaches or mentors, look at what incentives you are offering and determine if those are going to be sustainable. If so, offer those incentives to new coaches and mentors in order to get the program into an expansion. If the incentives were experimental, think about expanding them and making them permanent. Under these conditions, think about moving to more valuable incentives. When you find that coaches and mentors are performing well in an incentive environment, this is a sign that you've hit the

mark. And let's face it: one of the best ways to get people's attention these days is to offer value. Another way to expand incentive is to offer "better" incentives for protégés who want to become coaches or coaches who want to take on additional protégés. There are many ways to get creative with incentive, especially if the program has led to higher productivity or decreased costs.

Another way to expand a successful coaching or mentoring program is to make it formal. You may have been right on target with your informal program, but an expansion in an informal environment could create confusion. Before you expand, take the time to make the program formal by creating training, schedules, selection criteria, and evaluation criteria. This way, as with any major program that is being expanded, you can bring some order to a larger group of people or a wider geographic spread.

Along the lines of formalization, take a look at the target population of your coaching or mentoring program. As we discussed in the beginning, you may have created a program strictly for one area or one group of people within the organization, such as management trainees or the sales department. If the program has had a great deal of success, look for other areas within the organization that could benefit from the program and its benefits. Depending on your organization's size, you can even make plans to expand to the entire organization. If your program was already rolled to the entire organization, consider how you can give the program a further reach.

Expansion may sometimes be easier said than done, especially if money is involved. But there are ways to expand on an existing budget, especially if that budget is aimed at training and development.

Consider taking some of your T&D budget and allocating it to the coaching or mentoring program. You've already seen success and are able to measure that success, so why not take

existing dollars and put them into the program. In fact, as the program continues to succeed, you may be able to ask for more money, especially as economic conditions improve. But if the money remains tight, look for training programs that can be cut in favor of the coaching program. If you do this, you may be able to prove that the program is worth a few more dollars, especially because overhead on a coaching or mentoring program tends to be lower than formal training programs.

Finally, don't be afraid to show your results to decision makers in order to look for ways to expand. If the numbers show success, the organizational decision makers may be more willing to help you expand the program. In fact, those decision makers may be able to give you ideas and further clearance on expansion. Going to the decision makers and stakeholders to ask for expansion is also a great way to get the buy-in of those who may not have given it at the beginning.

Once your coaching or mentoring program has become successful, remember to look for ways to expand it. The benefits will be far-reaching and can change the organization for the better.

### **Step Seven: Make It Permanent**

As we close our discussion on creating a coaching or mentoring program, you must take the time to make the program permanent. You've measured the success of the program in both human capital and otherwise. You've shown that success to the decision makers and stakeholders and they are "on board". Let's look at some ways that you can make the program a permanent part of the organization.

First, the key part of permanence is to always be a step ahead of the organization. If things are going to change, you need to be aware of the coming changes. To do this, you should keep in contact with your executive sponsors or stakeholders. Set regular meetings with them using the coaching program as a meeting

subject in order to keep the program in their minds. Be prepared to show how you're evaluating and making changes along the way, both the good and the difficult changes. Once you've got this "window" into the future of the organization, you can always be on the lookout for ways to change the program with the organization. And when you do this, your executive sponsorship and buy-in will continue.

If your program involves a formal training course for coaches or mentors, be sure to keep that training alive and well - and on the schedule at all times. If organizational members are looking for ways to expand their own careers, they will inquire about the program. This is another way to keep in permanent. Don't offer the course or the coach and mentor openings too frequently - one of the chief concerns in marketing a great product or service is to keep it scarce. And prospective coaches or mentors may have to wait to get into the program, which is a good thing. Keep in mind that just as you evaluate the coaching program itself, you must evaluate the training program, as well. Keep it fresh and people will keep lining up.

In regard to the coach and mentor "positions", keep them at a level of scarcity, as well. Determine your time frame for opening the program to new coaches and mentors and stick to it. Conduct a marketing "blitz" just before you open the program each time in order to peak interest on the part of coaches and protégés. When the members of the organization know the benefits of the program and begin to know when it opens, they will be ready to move when the time comes. This tactic can keep the program alive and make it part of the organization's "mental calendar". In terms of marketing, be sure to use your executive

sponsors as spokespeople when the time comes to open the program. This kind of marketing is effective and is also a definite mark of permanence.

If your program is still in "limited release", that is, not a part of every area of the organization, go through the steps for expansion. When you do this, you'll be able to create the permanence that we are discussing. By deploying the program to all levels, you'll also be able to create the concept of scarcity that we've just discussed.

Another way to maintain permanence is to keep measuring and evaluating the program. Don't give in to the temptation of going through a few evaluation cycles and then stopping. Evaluation takes time and resources but it will be worthwhile as the program changes with the organization and its needs. And as you market the program, the members of the organization will be able to see that coaching and mentoring is there to stay.

Before we finish our discussion on creating a coaching or mentoring program, let's review the steps. First, determine your goals and the type of program you're going to implement. Second, take the time to design the program based on those goals. Third, plan an implementation strategy that includes marketing, training, scheduling and selecting coaches, mentors, and protégés. Fourth, be sure to measure the effectiveness of the program through formal, informal, and benchmarking methods. Fifth, don't be afraid to make changes. Sixth, remember to look for ways to expand the program at all levels. Finally, always make it permanent.

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