Mission

The Helzberg Entrepreneurial Mentoring Program is dedicated to growing and nurturing mentoring relationships by providing an enduring link between knowledgeable business veterans and established entrepreneurs. Our primary focus is the development of a long-term relationship with a mentor who acts as a coach and a sounding board.

The HEMP User’s Guide
Development & Contact Information

The mentoring relationship is the primary focus of the Helzberg Entrepreneurial Mentoring Program (HEMP). The key to all mentoring relationships is sharing with and learning from one another.

The HEMP User’s Guide is a living document that evolves as the program and its participants evolve. It is a compilation of ideas, concepts and resources gathered from you as HEMP participants, research on best practices and ever-evolving organizational knowledge.

The oversight committee for the 2003 HEMP User’s Guide:
- Trish Costello, Kauffman Fellows Program
- Bill Eddy, UMKC Dean Emeritus
- Bill Reisler, Kansas City Equity Partners
- Walt Rychlewski, William Jewell College
- Michele Janson, HEMP Executive Director

Copyright © 2003 Helzberg Entrepreneurial Mentoring Program

4747 Troost Avenue · Kansas City, MO 64110
(816) 235.6125 · Fax (816) 235.6564
www.HelzbergMentoring.org

Copyright © 2003 Helzberg Entrepreneurial Mentoring Program
Forward

As an active participant in the daily struggle for success and the precipitous ups and downs of business, I have been fortunate through the years to find mentors who would listen, help me ask myself the right questions, and provide support and friendship during the inevitable lonely periods of leadership.

In 1972, at a business meeting in Pebble Beach, I heard Ewing Kauffman give an inspirational speech and had the pleasure of making his acquaintance. He suggested I “drop by the office” when we returned home. That invitation sparked a relationship that lasted until he passed away in 1993. Mr. K was not familiar with retailing or the jewelry industry. His incredible success had been achieved in a completely different industry than my own. His insights, however, raised a curtain that provided me a completely different view of our business. I had perceived myself as successful when we began our informal visits, yet he broadened my vision tremendously. One day, as I thanked him for his years of support, he replied, “That’s OK, someday you will help someone too!”

That statement has everything to do with this program. I have had many wonderful mentors. Interestingly enough, few of them were retail jewelers. I have come to believe that this unbiased, free flowing exchange of ideas from comrades in other business fields is what has made mentoring such a valuable part of my life.

Why am I writing this explanation? So that all potential participants and supporters understand that the goal of our program is to develop mentor/mentee relationships that emphasize chemistry and parallel challenges rather than industry specific experience. Personal chemistry is truly the magic of the program. When nurtured over time, it is a powerful source of inspiration and success. “Business is People,” and that common thread cuts across all areas of the business world.

This program is built on the experience and generosity of successful business veterans who want to help other entrepreneurs enhance their success. All our mentors themselves had mentors who helped them, and now they want to help build more success for others.

Likewise, this User’s Guide has been developed as a communication tool to capture and share some of the knowledge and experience of our mentors, throughout the life of the program, to help others make the most of their mentoring relationships. Each of you will use this guide differently, which is why the information is presented in various formats.

Wishing you every success in your mentoring relationship!

Barnett Helzberg, Jr.
Table of Contents

Introduction
- Mission and Contact Information ................................................................. 1
- Forward – Barnett Helzberg, Jr. ..................................................................... 2
- Table of Contents ........................................................................................... 3
- Purpose of the User’s Guide ........................................................................... 4
- Overview of the HEMP Master Mentor Model ........................................... 5
- Definitions of Mentoring ............................................................................. 7

Best Practices - HEMP Master Mentor Model
Characteristics of a Positive Mentoring Process
- Good Communication .................................................................................. 10
- Building Trust ............................................................................................... 15
- Matching Expectations .................................................................................. 20
- Measurement and Feedback ......................................................................... 25

Best Practices - Tools & Resources
- Tools ............................................................................................................. 30
  - List of Tools ............................................................................................... 30
  - Templates & Worksheets .......................................................................... 32
- Resources ...................................................................................................... 40

Best Practices - FAQs – Frequently Asked Questions
- Questions about the program ...................................................................... 48
- Questions about events ................................................................................ 50
- Questions asked by mentees ...................................................................... 51
- Questions asked by mentors ...................................................................... 54
Purpose of the User’s Guide

The purpose of the HEMP User’s Guide is to provide a comprehensive, single source for documentation on all aspects of the mentoring relationship within the Helzberg Entrepreneurial Mentoring Program. The User’s guide is the source for answers to your questions, ideas and guidelines for your mentoring relationship and a place to capture your own thoughts on mentoring.

The HEMP User’s Guide is a living document that evolves as the program and its participants evolve. The User’s Guide will continue to build, change, to be refined and mature with the growth and feedback of HEMP participants. This book is written by and for HEMP participants.

The HEMP User’s Guide is a living document that captures and shares the best of HEMP mentoring ideas and practices. The documentation facilitates an open environment of exchange and acceptance of approaches, ideas, practices and lessons learned, as experienced and shared by HEMP participants.

The HEMP User’s Guide is to be used by mentors and mentees to answer questions about the HEMP program and to facilitate the navigation of a positive mentoring relationship. It is an evolutionary document that will grow, change and improve with the growth and feedback of HEMP participants.

HEMP hopes the User’s Guide is a helpful, insightful and inspirational companion throughout your mentoring journey.
Introduction

The HEMP Master Mentor Model

The **HEMP Master Mentor Model** is comprised of thoughts and ideas on mentoring as researched, experienced and shared by HEMP mentors and mentees. The **HEMP Master Mentor Model** is a written dialogue of best practices and lessons learned as shared for the purpose of mutual learning.

The **HEMP Master Mentor Model**, and mentoring relationships are evolutionary in nature. This document is an opportunity to learn from other mentors and mentees, and gain new ideas and approaches. The **HEMP Master Mentor Model** will be refined, changed and improved through your feedback with the growth of you and your relationship.

As you read through this model and move forward in your mentoring relationship, take a moment to capture your own experiences and best practices in the spaces provided throughout the document. Your input will infuse future versions of this document with fresh, new perspectives and remind you how far you’ve come in your journey.

**The HEMP Master Mentor Model…**

1) Defines the Master Mentor role  
2) Outlines characteristics of a positive mentoring process  
3) Provides the tools to support the process

…for making the most of the Mentor/Mentee relationship.
Overview, cont...

The Master Mentor Role

A Master Mentor acts as a process guide, not the sole source of knowledge, to help the Mentee learn to be successful. The Master Mentor knows the strengths, gaps and the growth goals of the Mentee and strives to guide them in their personal developmental process. The Master Mentor suggests other resources available within their own network and resource alternatives such as books, articles and experiential learning.

Characteristics of A Positive Mentoring Process

1) **Good Communication** - Share and agree upon patterns of work and preferred communication styles to ensure that communication is consistent, understood and useful.

2) **Building Trust** - The mentoring relationship is built on a common ground that fosters trust between the individuals.

3) **Matching Expectations** - The Mentor and Mentee must have mutual understanding and agreement on the expectations of each other’s role in the relationship and the areas of focus for short and long-term business deliverables and personal developmental goals.

4) **Measurement and Feedback** - Establish ways to measure success of the relationship and progress towards agreed upon expectations and deliverables.
What Is Mentoring?

Mentoring is a process, a relationship, a role… In this section the HEMP definition of mentoring, mentors and mentees is presented. Other definitions or examples of what mentoring IS or IS NOT are also included for clarity and perspective.

Mentoring

Mentoring is a facilitative learning process, a relationship, and an active partnership benefiting from the cumulative experiences of all involved. A mentoring relationship is most successful when there is a completely open and honest environment, mutual respect, clear, shared expectations, and an understanding of each participant’s role and responsibilities.

Mentor

A Master Mentor acts as a process guide, not the sole source of knowledge, to help the Mentee learn to be successful. The Master Mentor knows the strengths, gaps and the growth goals of the Mentee and strives to guide them in their personal developmental process. The Master Mentor suggests other resources available within their own network and resource alternatives such as books, articles and experiential learning.

Mentee

A Mentee is an active partner in the mentoring relationship. Mentees work with their Mentor in building the relationship, matching expectations, determining and prioritizing areas for development for their personal and business needs and providing feedback. Mentees take ownership of the change efforts addressed by the mentoring relationship.
### A Good Mentor Strives to Be…
- An active listener
- Available
- A challenger
- A cheerleader
- Committed to helping
- Empathetic
- Enthusiastic
- A Facilitator
- Focused
- A giver of options not directions
- A networker
- An objective sounding board
- Open-minded
- Passionate
- Patient
- Proactive
- Respectful
- A sharer of resources

### A Good Mentee Strives to Be…
- Adaptable
- Available
- Committed
- Curious
- Flexible
- Focused
- A good questioner
- A good listener
- Honest about successes and failures
- Humble
- Passionate
- Proactive
- Realistic in expectations
- Receptive
- Not defensive
- Willing to change
- Consistent in providing feedback
Other Thoughts on Mentoring

Clearly, there is not one prescription for mentoring. One’s definition of mentoring is flavored by the individual’s own life experiences, personality and the nuances of their current and past mentoring relationships. Here are a few other thoughts on mentoring.

“A mentor is a more experienced individual willing to share knowledge with someone less experienced in a relationship of mutual trust.”

- David Clutterbuck

“The purpose of mentoring is always to help the mentee to change something – to improve their performance, to develop their leadership qualities, to develop their partnership skills, to realize their vision, or whatever. This movement from where they are, (here), to where they want to be, (there).”

- Mike Turner

“A Mentor should have the qualities of experience, perspective and distance, challenging the mentee and using candor to force re-examination and reprioritization without being a crutch.”

- Christopher Conway

“Mentoring is a long term relationship that meets a development need, helps develop full potential, and benefits all partners, mentor, mentee and the organization.

“Mentoring is a supportive learning relationship between a caring individual who shares knowledge, experience and wisdom with another individual who is ready and willing to benefit from this exchange, to enrich their professional journey.”

- Suzanne Faure

“A mentor is … “A trusted counselor or guide. Normally a senior person to the associate. A mentor is a counselor, coach, motivator and role model. A mentor is a person who has a sincere desire to enhance the success of others. A person who volunteers time to help the associate.”

- Air National Guard, USA

* Adapted from “Mentoring Definitions: collected by Andrew Gibbons”, an article at The Coaching & Mentoring Network.
Good Communication

Characteristics of A Positive Mentoring Process

What is Good Communication?

1. Communication is a process, not a deliverable.

2. Useful skills for Mentors to perfect:
   - **Active listening** – reflect, clarify, summarize
   - **Demonstrating empathy** through warmth, understanding and support
   - **Emphasizing mutual exploration** versus prescription or judgment
   - **Empowering into action** by encouraging the Mentee to “be all they can be”

3. Mentees have ownership of any solution and the relationship.

4. Mentors should be a sounding board for ideas rather than telling Mentee the answer.

5. Share and agree upon patterns of work and preferred communication styles to ensure that communication is consistent, understood and useful.
Good Communication

Characteristics of A Positive Mentoring Process

Some tactics that may be useful in building good communication:

1. Look for a common interest beyond business. Consider hobbies, sports, family, and entertainment. These provide for an opening conversation, mutual respect, and shared experience.

2. Lower the walls between you.

   **Mentors:** Create opportunities for short communications between meetings. Consider forwarding articles of interest. Bring an article to your meeting. Ask the Mentee for advice, forward a funny story. Demonstrate that your door is always open.

   **Mentees:** Take initiative to ask questions, share news, etc… The Mentor’s door is open; don’t be star-struck or too shy to call or e-mail. If the Mentor is busy, he/she will tell you and get back to you. Create opportunities for short communications between meetings. Let your Mentor know that you want them to be aware of key events.

3. Look for ways to balance the relationship.

   **Mentors:** How is the relationship helping you? For example, did you receive help from a Mentor in your career; are you pursuing your role as a Mentor partially from your obligation to pass on this gift?

   **Mentees:** Let the Mentor know what you’re getting out of the relationship and how the Mentor has caused you to think differently. Let the Mentor know how much you appreciate their time and talents. Say thank you.
Good Communication
Characteristics of A Positive Mentoring Process

What other tactics have you found to be helpful in building good communication?
Good Communication
Characteristics of A Positive Mentoring Process

Ideas from HEMP Mentors:

Initial Actions
- Review information about your Mentee (provided by HEMP) prior to meeting
- Visit the Mentee’s site and meet their key personnel
- Ask/share the best ways for you to communicate
- Tell your story…ask them to tell you theirs
- Share personal information (i.e. family, hobbies, interests, etc…)
- Review an org chart or layout of the business – ask how it all fits together, how responsibilities are delineated, etc.

As you progress…and Ongoing Actions
- Share your greatest mistakes with the Mentee
- Look for a comfortable meeting space (i.e. Mentor’s home, Mentee site, restaurant)
- Turn off your cell phones, pagers. Devote the time together without distractions
- Interview key employees of the Mentee (only with trust and if mutually desired)
- Ask Mentee what they are doing that keeps the business going forward
- Generally ask open ended questions

Ideas from HEMP Mentees:

Initial Actions
- Review information about your Mentor (provided by HEMP) prior to meeting
- Ask the Mentor to visit your office and meet your key personnel
- Ask/share the best ways for you to communicate
- Tell your story…ask them to tell you theirs
- Share personal information (i.e. family, hobbies, interests, etc…)
- Provide as much information about your company that you feel comfortable sharing – operations data, organizational charts, financials, etc.

As you progress…and Ongoing Actions
- Put your worst foot forward – share mistakes and what you’ve learned
- Look for a comfortable meeting space (i.e. Mentor’s home, Mentee site, restaurant) – being consistent can help
- Turn off your cell phones, pagers. Devote the time together without distractions
- Don’t be afraid to contact your Mentor, send updates, ask quick questions, etc…
- Generally ask open ended questions
Good Communication
Characteristics of A Positive Mentoring Process

Example questions to ask your Mentor/Mentee and share about yourself:

- What’s your story? How did you get into this business? What was the turning point that made you want to own your own business?

- Tell me about your family.

- What do you like to do in your spare time – if you have spare time?

- Are you a morning person or do you prefer days and nights?

- When is the best time for us to get together – time of day, day of week?

- What venue would be best – restaurant, bar, office, home, club?

- What is the best way for us to catch each other – office phone, e-mail, cell phone?

- Are you quick to respond to messages?
Building Trust

Characteristics of A Positive Mentoring Process

How do we build trust?

1. The best mentoring relationships are built on a common ground that fosters trust between the individuals over time. You begin building trust from the very beginning of the relationship.

2. Be comfortable putting your worst foot forward with your Mentor/Mentee. Mentoring flourishes in an environment where participants are comfortable with one another.

3. Building trust is a gradual process of consistent reaffirming behaviors over time to attain trust. Here are some behaviors to consider:

   - Confidentiality – affirm and reaffirm this rule
   - Openness - including your own shortcomings
   - Willingness to share – prove you trust first
   - Non-judgmental - unconditional positive regard
   - Belief in each other – consistently keep your promises
   - Affirmation of individual – “treat like a guest”
Building Trust

Characteristics of A Positive Mentoring Process

Some tactics that may be useful in building trust:

1. Look for an opportunity to show you have made mistakes. Put your “worst foot forward.” This provides an opportunity to show that you trust your Mentor/Mentee with embarrassing information. Mistakes are normal and OK to talk about.

2. Tell your Mentor/Mentee areas where you need to improve and what to expect from you. For example, are you habitually late? Do you tend to offer more time than you really have? Do you fail to return phone calls? How early or late can you call? These discussions help build a common ground.

3. Mentors, consider using examples from your own business to illustrate that you trust your Mentee with this business information. Avoid bad examples from other people’s businesses. Your Mentee will not want to be a bad example in a future story you tell to someone else.

4. Confidentiality statements are probably not necessary and are not encouraged. Both parties should only share what they are comfortable sharing.

5. Consider tools such as HF4D analysis as an exercise in trust. Agree upon interpersonal dimensions - what you can expect from each other.

6. Reflect on trusting relationships you have had and elements that demonstrated or built that trust.
Building Trust
Characteristics of A Positive Mentoring Process

What are some common elements of trusting relationships you have had?

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________
Building Trust

**Characteristics of A Positive Mentoring Process**

**Ideas from HEMP Mentors:**

**Initial Actions**
- Make a statement to ensure confidentiality for all the Mentee shares – ask for confidentiality for all you share with the Mentee (repeat this often)
- Share some of your weaknesses so the Mentee knows this is a mutual exchange

**As you progress…and Ongoing Actions**
- Look for common interests and start each meeting connecting on this
- Be accountable and follow-through…keep Mentee accountable by tracking expected actions
- Look for opportunities to put your worst foot forward
- Understand the personal and professional growth desires of the Mentee

**Ideas from HEMP Mentees:**

**Initial Actions**
- Make a statement to ensure confidentiality for all you share with one another
- Share some of your weaknesses, mistakes, areas where you feel you need to develop; ask the Mentor to do the same
- Ask the Mentor why they are doing this, what they are getting out of it – will help you feel less intimidated by your mentor

**As you progress…and Ongoing Actions**
- Be accountable and follow-through…keep your Mentor accountable for those things they also promised
- Look for opportunities to put your worst foot forward, continuous
- Share both your personal and professional growth desires with your Mentor
- Let your Mentor know non-business issues that could be impacting your business life and decisions
Building Trust
Characteristics of A Positive Mentoring Process

**Example questions to ask your Mentor/Mentee and share about yourself:**

This characteristic is more focused on the mentor’s actions and openness than questioning the mentee. Be willing to answer your own questions first.

- What have you learned from your mistakes?
- What have you learned from your successes?
- What dilemmas do you face on a daily basis?
- What is your greatest weakness and greatest strength?
- What other things are happening outside of work that are impacting your life – issues at home, illness in the family, attending graduate school, involvement in other organizations, huge home projects (remodeling), etc…?
Matching Expectations

Characteristics of A Positive Mentoring Process

What does matching expectations mean?

1. The Mentor and Mentee can usually function better if they have mutual understanding and agreement on the expectations of each other’s role in the relationship and the areas of focus for short and long-term business deliverables.

2. A few guidelines for your role:

   **Mentors:**
   - Acts as a process guide, not the sole source of knowledge
   - Focuses on problem definition
   - Suggests other resources available within HEMP or mentor's own network, or alternatives such as books, articles, experiential learning
   - Gets to know and use other Mentors’ expertise

   **Mentees:**
   - Do not look to your Mentor for the solution – he/she is your Mentor, not your consultant
   - Focus on problem definition
   - Be open to resources your Mentor might suggest, even other Mentors with more specific expertise

3. Agree upon deliverables by writing a “Learning Agreement.” A Learning Agreement is simply a written understanding of the goals you are working towards together. Goals and deliverables can be short-term or long-term, business or personal. It is important that the Mentee retains ownership of the solution.
Some tactics that may be useful in matching expectations:

1. Mentees should tell their story. How did they get into the business? Why did they get into business? What are their aspirations for the business?

2. Develop a “Learning Agreement” that includes two or three short-term priorities and two or three long-term priorities.
   - Are there critical business issues, which threaten the survivability of the business? These should be handled before strategic issues can be addressed.
   - Are there personal development issues for the Mentee?
   - Are there opportunities to use other HEMP resources?

3. Consider the use of simple business strategic planning tools.
   - Organization charts. What do these people do? What does the Mentee do?
   - Gap Analysis.* Where is the business today? Where does the Mentee want it to be in 3-5 years? What is missing? What can we work on? Where was the Mentee 3-5 years ago? How did they get to where they are?
   - SWOT Analysis.* Strengths, Weaknesses, Opportunities and Threats. What can we work on?
   - The Management Physical – see Ted Cohn’s article in the HEMP 2001 Retreat Book*
   - The Three Clarities – see notes from Fred Lyon’s talk, Annual Dinner 2002*

*See also the Tools and Resource sections, and the Appendix of the HEMP User’s Guide
Matching Expectations
Characteristics of A Positive Mentoring Process

What are some of the tactics or tools you have found helpful in goal setting and matching expectations?
Matching Expectations
Characteristics of A Positive Mentoring Process

**Ideas from HEMP Mentors:**

**Initial Actions**
- Ask the Mentee “Why did you want to be part of HEMP?” Answer the same question.
- Ask what the Mentee expects to get out of their involvement with HEMP and with working with you
- Ask the Mentee to define the goals for the business
- Ask where the Mentee feels they need help and support
- Discuss how you, the Mentor, can add value
- Set a verbal contract of goals/what you will be working on together
- Ask 3 questions:
  - What drives your business?
  - What is your competitive advantage?
  - Why are you successful?

**As you progress…and Ongoing Actions**
- Continue to revisit the question “what are the Mentee’s goals.” Consider doing this at regular intervals, i.e. quarterly
- Utilize business diagnostic tools:
  - Reviewing org charts / process charts
  - Realize that with some needs your Mentee has, it may be best to connect them with a 3rd party expert

**Ideas from HEMP Mentees:**

**Initial Actions**
- Share with the Mentor why you wanted to be part of HEMP and what you expect of the program and working with a Mentor
- Ask the Mentor why they want to be part of HEMP, why they are being so generous with time and experience
- Share your definitions of success for yourself and your business, identify goals for both
- Ask your Mentor for help where you feel you need support and be open to their thoughts on that and what other resources might be best
- Identify 1 or 2 key issues that could enhance short and long-term goals
- Set a verbal contract or a “Learning Agreement” of goals/what you will be working on together
- Ask for “homework” at the end of each session and be accountable for it at the next meeting

**As you progress…and Ongoing Actions**
- Continue to revisit your goals to ensure that you are still focusing on the right things
- Utilize all sorts of resources and tools for understanding your business and setting goals
- Work with your Mentor to determine who might be good resources for you – Don’t be afraid to make that phone call or send an e-mail
- Use the HEMP Directory
Matching Expectations
Characteristics of A Positive Mentoring Process

Example questions to ask your Mentor/Mentee and share about yourself:

See also the questions introduced in this section under “Some tactics…."

- Why did you want to be part of HEMP?
- How do you think your involvement in HEMP and with a Mentor/Mentee will help you?
- Since we’ve defined the goals of the business (see tactics), where do you feel you (the Mentee) need the most help?
- How do you see our relationship evolving? And where do you see me (the Mentor) being able to help the most?
- In your mind, is this relationship about developing the business or developing your management and leadership abilities, or both?
- Are you open to looking for and involving other resources to accomplish our goals?
Measurement & Feedback
Characteristics of A Positive Mentoring Process

What is measurement and feedback?

1. Establish ways to measure your success in building the relationship.

   Mentors: Examples of possible questions to measure:
   ° Where do you fall on the scale of Mentor-to-Consultant? You may be at different points of the scale at different points in the relationship or with different goals being addressed.

   Mentor-------------------\---------------------------------Consultant

   ° Does your Mentee trust you? Are they putting their worst foot forward? Have you developed mutual trust?
   ° Do you have matching expectations? What are they and how much progress has been made?

   Mentees: Examples of possible questions to measure:
   ° Is your Mentor a coach and sounding board? Do you readily retain ownership of all problems?
   ° Are you easy to communicate with?
   ° Are you comfortable in putting your “worst foot forward?” Is the feeling of trust mutual?
   ° Do you have matching expectations? What are they and how much progress has been made?

2. Establish ways for you to measure progress towards agreed upon expectations and deliverables.

3. Clarify the expectations and adjust the plans or process when necessary. Is each party getting what they want or need out of the meetings? Do you ask each other whether the needs are being met?

4. You and your Mentor/Mentee will be asked to evaluate the year, your progress and the relationship at the end of each program year (August-September). You will be asked whether you want to continue the relationship into the following year. You will then be asked to launch your next year taking into consideration your evaluations and continued goals.
Measurement & Feedback

Characteristics of A Positive Mentoring Process

Some tactics that may be useful in measurement and feedback:

1. For each agreed upon goal/expectation that was discussed in “Matching Expectations”, you should determine the best way to measure progress, issues and success.

   - What is the measure for progress (i.e. steady increase in sales)?
   - How will we track that measure?
   - When are the critical milestones for measurement (i.e. monthly, quarterly)?
   - How will we know things aren’t working?
   - How will we know progress or issues are as a direct result of what we are doing together?
   - How will we know if we are successful?

2. At the end of a meeting, check to determine if you are on the right track. It may be good for each person to know that self-assessment is part of the process.

   - Are we accomplishing what we wanted to?
   - Are there things that we could do differently?

3. Be accountable for action items you have promised to do. At the end of a meeting make sure you both know what you have agreed to work on before you meet again. At the beginning of the next meeting hold one another accountable for those actions.
Measurement & Feedback
Characteristics of A Positive Mentoring Process

What are some ways you have found useful in measurement and feedback?
Measurement & Feedback
Characteristics of A Positive Mentoring Process

Ideas from HEMP Mentors:

Initial Actions
- Ask the Mentee how they measure success and/or red flags in their business
- Ask the Mentee to define success for the business
- Agree on the definition of success for your Mentee/Mentor relationship

As you progress…and Ongoing Actions
- Be accountable to one another – Keep track of actions determined and follow-up with one another
- Ask the Mentee periodically if the relationship and the work you are doing together is meeting their needs and expectations
- Have a “P3 Meeting” – Problem, Progress, Planning

Ideas from HEMP Mentees:

Initial Actions
- Share how you measure success and/or red flags in your business
- Define success for your business
- Ask the Mentor how they would define success, what they would measure
- Agree on the definition of success for your Mentee/Mentor relationship
- Set specific measures for each of your goals, a way to track and review progress
- Give your Mentor feedback on how they are helping you and making a difference
- Say Thank You

As you progress…and Ongoing Actions
- Be accountable to one another – Keep track of actions determined and follow-up with one another
- Have regular meetings with yourself to work on identified goals and to review progress
- Feel good about doing something no matter how small
- Ask the Mentor periodically if the relationship and the work you are doing together is meeting their needs and expectations
**Example questions to ask your Mentor/Mentee and share about yourself:**

- How do you measure success and/or issues in your business?

- Define success for your business.

- Define success for yourself, your life.

- What is the definition of a successful Mentor/Mentee relationship – how will we know if we are working well together?

- Are we the right Mentor/Mentee match for you (the Mentee) to meet your goals?

- Ask the 3 magic questions for customer service.
  - What are we doing that you like?
  - What are we doing that you don’t like?
  - What are we not doing that you would like us to do?
Tools for Matching Expectations

**HEMP Library**

**HEMP User’s Guide**
- Gap Analysis – Mapping where the business is today, where the mentee would like to be in 3-5 years and what must be done to reach that vision. A Gap Analysis can be conducted at many levels – high, company wide, strategic level – mid, a specific function or department of the company – low, a specific issue or team.
- Matching Expectations Worksheet – Identifies five key skill areas: leadership, decision-making, communication, planning and personal. Provides opportunity to review each area in terms of key ideas/issues, plans for addressing those ideas and issues, progress and evaluation of implementation of those plans, additional follow-up needed, and pearls or key learnings attained along the way.
- SWOT Analysis – A look at the company in terms of the Strengths, Weaknesses, Opportunities and Threats and determine on which issues it is the best to focus work. Note: it is not always best to focus on weaknesses and threats – often improving and capturing opportunities and strengths can be just as effective.

**Outside Resources**
- Organization Chart Analysis – Understanding the functions of your company as they relate to the structure of the company and the people in that structure (roles & responsibilities).
Tools for Measurement and Feedback

° The 3 magic questions for customer (mentor/mentee) feedback:
  o What are we doing that you like?
  o What are we doing that you don’t like?
  o What are we not doing that you would like us to do?

° Measurement & Feedback Evaluation Form – asks you to evaluate your mentoring relationship and the HEMP program in several areas as well as review your learning and successes over the time period being reviewed.

Other Business Tools

HEMP Library

Gap Analysis
Worksheet

Company__________________________________________________________

Level of Focus (i.e. company, department, function) ______________________
*There can be several areas of focus at the level of focus selected.*

Time Frame of Focus (i.e. 6 months, 3-5 years, 10 years) __________________

<table>
<thead>
<tr>
<th>Area of Focus</th>
<th>Current State</th>
<th>GAP</th>
<th>Desired State</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

*Version 2.0 2/20/03 Helzberg Entrepreneurial Mentoring Program - User's Guide*
## SWOT Analysis

*Worksheet*

Company ____________________________________________

<table>
<thead>
<tr>
<th>Strengths</th>
<th>Weaknesses</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Opportunities</th>
<th>Threats</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>
## Matching Expectations
*Planning & Progress Worksheet*

Company ____________________________________________________________

<table>
<thead>
<tr>
<th>Leadership</th>
<th>Decision Making</th>
<th>Communication</th>
<th>Planning</th>
<th>Personal</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Key Business Ideas / Issues</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Plans</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Leadership</td>
<td>Decision Making</td>
<td>Communication</td>
<td>Planning</td>
<td>Personal</td>
</tr>
<tr>
<td>------------</td>
<td>-----------------</td>
<td>---------------</td>
<td>----------</td>
<td>----------</td>
</tr>
<tr>
<td>Progress &amp; Evaluation</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Follow-Up</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pearls</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Version 2.0
2/20/03
# Measurement & Feedback

## Evaluation Form

Your Name__________________________________________ Date __________

Mentor/Mentee Name________________________________________________

---

Number of contacts with your mentor/mentee __________

Number of contacts with your HEMP peers outside of events __________

---

<table>
<thead>
<tr>
<th>What are we doing that you like?</th>
<th>What are we doing that you like?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Your Mentoring Relationship</td>
<td>The HEMP Program</td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>What are we doing that you do not like?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Your Mentoring Relationship</td>
</tr>
<tr>
<td>----------------------------------------</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>What are we not doing that you would like us to do?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Your Mentoring Relationship</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td></td>
</tr>
</tbody>
</table>

---
Please share any PEARLS or AH-HAHS you’ve learned or experienced through your involvement in HEMP. How have you applied or plan to apply this information to your business?

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

How or what has changed since your involvement in HEMP…

In your business life:

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

In your personal development:

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

Other Comments

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________
HEMP Link Up Meeting Agenda

Experience shows that mentors and mentees tend to dive right into business matters without spending time trying to understand each other and how to best make the relationship work. Through a facilitated initial session, participants are encouraged to take a look at themselves and what they really want from a mentor / mentee relationship.

Suggested topics to discuss during the initial meeting:

1. Reasons why the mentor is volunteering time
2. What the mentee and mentor hope to get out of the relationship
3. Traits you find stimulating in other colleague relationships
4. Ways you go about building a relationship
5. Components of a relationship that are important to you
6. How you go about developing trust
7. Best ways to communicate
   ▪ Business and personal schedules, best times to reach each other, meeting/telephone/e-mail, parameters regarding contacting each other at home
8. Availability - how much time mentor is willing to give, mentee willing to commit
9. Comfort level in who picks up the tab when meeting over a meal
10. Sharing information - HF4D assessment, information about business
11. Keeping a journal or file - notes, assignments, information sent and received
12. Relationship with HEMP staff - respond and report
   ▪ HONESTY about relationship
   ▪ Report if things not going as expected - "no fault" separation option if chemistry does not develop in relationship
   ▪ Report accomplishments or difficulties, things learned due to mentoring to help develop the program
13. Future meeting dates / topics - one suggestion is to meet at the mentee's place of business early in the relationship and begin by understanding mentee's vision and goals
How to Be an Effective Mentee

1. Mentors have volunteered their time and want to give time and expertise to Mentees.
2. Mentors can only make themselves available. They can't do to or do for Mentees.
3. Mentors need psychic income to feel value for time given.
4. Get to know your Mentor. Make a priority of knowing what your Mentor's expectations, the parameters of the relationship, and how to feed the Mentor reward requirements (i.e., the psychic income needs).
5. Call your Mentor.
6. Schedule time with your Mentor.
7. Meet with your Mentor.
8. Do "homework" suggested by your Mentor.
9. Don't waste the Mentor's time if you are not going to follow through with some of the suggestions that the Mentor makes. Let your Mentor know why that suggestion doesn't fit your need at this particular time.
10. Don't wait until you are in crisis to call your Mentor. Make all issues a part of your regularly scheduled monthly or quarterly agenda.
11. Be honest about your successes and failures. Your Mentor cannot help you if you only tell him / her about what you've done right. Mentors need to know where you have gone wrong.
12. Give your Mentor feedback about suggestions taken or suggestions you feel are not right.
13. Call Michele and let her know what you are getting out of your relationship with your Mentor. Include lessons learned, projects undertaken, bad advice taken or ignored and how HEMP has helped you succeed.
14. Let Michele know if you are looking for a graceful way to exit the relationship. Needs and people change over time so it's OK if you need to develop a different mentoring relationship.
15. Call Michele or ask others in the program if you are looking for the right resource for a specific need. Skills and expertise by individual are also listed in the HEMP directory.
16. Participate in HEMP events. It's a great way to meet others and develop new relationships. Others may be able to help you through something that they have already worked through or be willing to serve on your Advisory Board or provide peer support for difficult times. HEMP is what you make it.
17. Be willing to give back. Everyone can benefit from the experiences of others.
18. HEMP's primary focus is the development of a long-term relationship with a mentor who acts as a coach and a sounding board. Take time to develop the relationship. The rewards are endless.
Resources on Mentoring

HEMP Library
Outside Resources


Resources on Good Communication

HEMP Library


Outside Resources

- Kevin J. Murphy. Effective Listening – How to Profit by Tuning Into The Ideas and Suggestions of Others. Eli Press.

Business Resources

Customer Service

HEMP Library

Decision Making

HEMP Library


Finance

HEMP Library


General Business Information

HEMP Library


**Human Resources**

**HEMP Library**

**Leadership**

**HEMP Library**

**Outside Resources**

**Management / Organization Structure, Operations, Culture**

**HEMP Library**

**Outside Resources**
° J. La Marsh. *Changing the Way We Change*. Addison-Wesley Publishing Co.
Networking

HEMP Library

Time / Stress Management

HEMP Library

Personal Development

HEMP Library

Outside Resources
Web-Site Resources

- All Business, Champions of Small Business – www.allbusiness.com
- Business Plans – www.bplans.com
- EntreBiz, Entrepreneurial Resource Center – www.entrebiz.com
- Entrepreneurial Growth Resource Center – http://bsbpa.umkc.edu/egrc
- Enterprise Center of Johnson County – www.ecjc.com
- Fast Trac Course, Kauffman Center for Entrepreneurial Leadership – www.entreworld.org
- First Step Fund – www.firststepfund.org
- Johnson County Community College Small Business Development Center – www.centerforbusiness.org/program.asp?sb
- Kansas Women’s Business Center – www.kansaswbc.com
- KC Catalyst – www.kccatalyst.com
- UMKC Small Business Development Center – www.bloch.umkc.edu/sbdc
What resources have you found to be useful in mentoring, business and personal development?
Questions about the Program

How do I get into HEMP? (both from mentor and mentee view)

Admission into HEMP for both Mentors and Mentees is an application and interview process. First one must meet the qualifications as outlined below. The interested party must then complete an application and submit it to the HEMP Executive Director along with the requested documentation. Interviews and site visits will be scheduled and conducted if the applicant is considered a good candidate based on the qualifications and application submitted.

*Mentor Selection Criteria:*
- Veteran business owner or top level executive
- Desire and ability to serve as a mentor
- Willing to openly share business knowledge – both successes and failures

*Mentee Selection Criteria:*
- Own or operate a business that is at least 3 years old
- Generate between $1 million and $75 million in annual revenues
- Have a desire to substantially grow the business

What are the expectations?

Mentors and Mentees are expected to meet with one another at least 4 times per year.

Mentees are expected to attend at least 10 events per year including annual retreat, 2 mentee only meetings, 3 breakfasts, and 2 of the major events held per year. In the first year of selection, mentees are expected to attend the orientation lunch and the matching event.

Mentors are asked to attend at least 3 events per year including 2 Mentor/Mentee meetings and 1 of the major events held per year.

Alumni and Resources are encouraged to attend as many events as possible to continue the valuable networking opportunities within HEMP.

Relationships between Mentors and Mentees are expected to be open, honest and confidential. Relationships among all HEMP participants are expected to be honest, respectful and professional.
What are the benefits?

The key benefit of being involved with HEMP is the invaluable experience participants have in the one-on-one mentoring relationship. The HEMP experience is enhanced by the educational and networking opportunities offered through events, mentor and mentee group meetings, and the retreat.

How much does it cost?

The fee structure and notes are as below:

Mentee: $700 per year *
Mentors: Fee is supported by HEMP – expertise and time is invaluable
HEMP Supporters: $300 per year

* Mentees that are married couples in the program from the same company with the same mentor, cost is one and a half times the annual fee per year.

Mentees must graduate from the 3-year program and pay all applicable fees before the remaining options are available.

Fees are subject to change annually.

What is the main focus of the program?

The one-on-one mentoring relationship is the focus of the program. The relationship between mentor and mentee, and the personal and professional accomplishments resulting from the relationship is the key to the program. All other aspects of the program inherently support the relationship and development of the mentee making for a well-rounded experience.

How long is this program?

The formal program with a Mentor/Mentee facilitated relationship is 3 years. After 3 years, Mentees may remain in the program as HEMP Supporting Alumni. There is an annual fee for HEMP Supporting Alumni to defray the administrative and program costs.
Event Questions

How will I know about events?

At the beginning of the year you will receive a calendar electronically and in wallet card format outlining the events for the program and calendar year. You can also find out about events on the secured section of the HEMP web site at www.HelzbergMentoring.org. Simply login with the password and open the calendar page.

For each event you will receive a “mark your calendars” e-mail approximately 4 weeks in advance. That will be followed by a paper invitation to your mailing address about 3 weeks prior to the event. An RSVP is requested for each event. If you RSVP “yes” for the event you will receive a reminder e-mail a couple days before the event.

Can I invite guests to HEMP events?

That depends on the type of event. Business guests are welcome at the breakfast series and most speaker events unless noted on the invitation. Significant others and spouses are welcome to attend the Celebrate HEMP event, the mentor appreciation event and other designated special events. Mentee and mentor group meetings are for HEMP participants only.

Is there a charge for guests?

Guests may attend events for a fee, which is stated on the program invitation. Spouses or significant others are complimentary at the Celebrate HEMP event and the mentor appreciation event. There is a charge for all retreat attendees to help defray a portion of the retreat costs.

There is a no show or cancellation charge for all HEMP participants and guests for all events.

Why is there a charge for the annual retreat and certain events?

There is a charge for attending the annual retreat and certain other events to help defray the cost of expensive programs. Certain programs that HEMP provides to its participants need to be a shared cost between the program and those that benefit from it.
Questions from Mentees

What types of things should I ask my mentor?

Types of questions asked vary by relationship and there are no right or wrong questions to ask. During the expectation setting phase of the relationship, ground rules should be set so that each individual in the relationship is comfortable sharing information. As a general rule of thumb, if you are not comfortable asking a question or sharing certain information, then don’t share it explaining the reason why you are not comfortable at the current time providing the information.

Do I always need to have a major business issue to get in touch with my mentor?

No. However, any parameters around this question should be determined with the matching expectations discussion you and your mentor have at the beginning of your relationship. The breadth of topics and situations you discuss with your mentor will develop and change as your relationship develops and changes over time.

Is my mentor available any time day or night?

Your mentor’s availability, the best times and methods of getting in touch are items to discuss in one of your first meetings. You and your mentor should share your communication styles and specifications to ensure you have the best communication possible and set expectations in that area of your relationship.

Who can I go to if I have questions about the effectiveness of my mentor or the program?

If you have questions, please give the executive director a call. Staff is there to help you maximize your HEMP experience.

Are there certain things that I should or shouldn't do as a mentee?

Always be open, honest and respectful with your mentor and the relationship and work you are doing together. Refer to the Best Practices – The HEMP Master Mentor Model section of The HEMP User’s Guide for more information.
**What if I can't attend all the HEMP events?**

Attending all HEMP events is not mandatory. HEMP events provide additional opportunities to learn about other business leaders and mentoring as well as occasions to visit with your mentor and network with other mentors and mentees. Attending events enhances your HEMP experience and gives you maximum benefit of the program.

**What is a forum group and how do I get into one?**

A forum group consists of eight to twelve individuals that meet monthly to discuss business issues in greater depth than allowed at HEMP functions. It is a form of peer mentoring that is very successful with many HEMP participants.

To find out more about forum groups, contact the HEMP executive director who can refer you to members of existing forum groups. Each forum group determines their own rules for increasing the size of their respective group.

**How do I use the directory?**

The directory is meant for HEMP use only and not to be reproduced, shared outside of HEMP or used for sales efforts or charitable requests.

The HEMP directory has several sections to provide you with the information you need.

- **Program Information** – Includes the mission, staff and location information, history, funding partners, Board of Directors, Advisory Panel, and participant guidelines

- **Alphabetical Listing by Name** – Includes listing of names, numbers and e-mails only followed by a comprehensive section with a photo for each participant (office and home contact information, name and a description of the individual’s business, skill/expertise categories)

- **Skills and Expertise Listing** – Includes a listing of skills and expertise categories and lists all participants that have associated themselves with that particular skill or expertise. For example if you require insight on specific topics like profit sharing of PR, you can look up the category and know which mentors and mentees may be good resources.

- **Listing by Category** – Includes a listing of participants by the category of their type of participation in HEMP, i.e. mentors, mentees, and HEMP Supporters. It also lists mentees by class year.
Can I have Barnett as my mentor?

Barnett is such an integral part of what HEMP is, the program, the people and the spirit, that he is truly a mentor to all of HEMP and does not focus on just one relationship. Barnett is available to any HEMP participant that would like to visit with him. Call the foundation office at 816-753-7776 to make an appointment.

How do I get matched with a mentor?

The matching process involves your input, the prospective mentor’s input and input of the matching committee. Information learned during the application and interview process is taken into consideration. Biographies of available mentors are shared prior to the matching event to allow the mentee an opportunity to self-select people that they would be interested in talking with. At the conclusion of the matching event, both mentors and mentees are asked to provide names of individuals that they would be interested in pursuing a relationship with and a recommendation on the final match is made by the matching committee with input from all of the above. The chemistry between the mentor and mentee is just as important as their biographies or complementary backgrounds.

Can I change mentors?

It is the responsibility of the mentor or mentee to make the HEMP executive director aware of relationships that are not working. If the relationship is not working, the executive director will help you find the right match. A good mentoring relationship is life long and its value is priceless. There is absolutely no benefit from staying in a relationship that is not working.

Can I have more than one mentor?

Under the master mentor concept, there is one master mentor assigned to the mentee. The master mentor has responsibility for working through the process with the mentee and is not the sole source of knowledge. The master mentor is familiar with the other skill sets inside and outside of HEMP and refers the mentee to those individuals as needed. You are also welcome and encouraged to seek help from any number of sources. As a point of courtesy, please let your assigned master mentor know of the others that are working with you.
Questions from Mentors

What are my responsibilities as a mentor?

The mentor’s responsibility is to act as a coach and sounding board for the mentee and not be the sole source of knowledge for all of the mentee’s issues. Mentors are also encouraged to attend events so that they can get to know others in the program and recognize the resources that they have available to call upon to work through a specific mentee issue.

What if there are questions that I can't answer or help that my mentee needs that I can't offer?

You are not expected to always have the answer, but to be a guide and a resource for your mentee. If you don’t know the answer or feel you aren’t the best person to mentor your mentee through a particular issue, point your mentee in the right directions. Suggest that you and your mentee involve another HEMP mentor or resource that may specialize in the topic at hand. You can suggest any resource you might use yourself for insight, even outside of the HEMP pool. Or point your mentee in the direction of written resources in books, periodicals, the Internet or possibly suggest he or she contact another business development organization. The HEMP staff is an excellent source for resource ideas.

Do I need to attend HEMP events or can I just be a mentor?

Attending HEMP events is to your benefit and that of your mentee and the organization. Events provide a great opportunity for you to network with your mentee and other mentees and mentors in HEMP. Event speakers, presentations and group discussions just may give you that next idea to boost your mentoring relationship, your business or even yourself. Mentor participation in events truly enhances the experience for all mentees in the program.

What role do I play if there is not a mentee match?

If there is not a mentee match for you in the current classes, you have the option of remaining in the program as a HEMP Resource. Your experience and expertise is invaluable for those specific and occasional questions that may come from one of the mentees when they need a resource outside of their own mentor relationship. As a HEMP Resource, you are still an active participant in HEMP to the point that you wish to attend events and be available to mentees. You may be reengaged as a mentor with the new incoming class or on the occasion that a mentee needs or requests a new mentor.
Are there tools to help me with my mentoring relationship?

The HEMP User’s Guide is a fantastic guide for developing and making the most of your mentoring relationship. It also has reference sections for tools and resources that will support you in your mentoring efforts.

What if the relationship with my mentee is just not working? How does HEMP find this out and what do I do?

It is the responsibility of the mentor or mentee to make the HEMP executive director aware of relationships that are not working. A good mentoring relationship is life long and its value is priceless. There is absolutely no benefit from staying in a relationship that is not working.