



MENTOR MATCH



Welcome to the CFA Society Boston Mentorship Program!

You have made an important commitment to serve as a Mentor or a Mentee. This toolkit offers helpful guidelines and practical advice for making the most of your Mentor/Mentee relationship.

This Information will help you develop an effective long-term mentoring relationship. Add your own ideas for building a productive relationship as you get acquainted and begin working together.

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PROGRAM OVERVIEW

Mentor Match Program Purpose & Goal

CFA Society Boston’s Mentor Match Program was established to offer a unique opportunity for less-experienced CFA Society Boston members to connect with and learn from seasoned industry professionals. The Program leverages the vast experience of its membership to promote skills development, leadership, and professional growth through the exchange of ideas and sharing of information between the Mentor and Mentee.

Participant Requirements and Expectations:

The Mentor Match program runs in six-month cohorts starting in mid-January and July; we encourage you to continue to strengthen your mentee/mentor relationships long after the formal portion of the Program has concluded. Mentors and Mentees commit to participate for the duration of the Program and can voluntarily extend the relationship length. Please let us know if extenuating circumstances prevent you from completing your Program commitment.

- Mentors and Mentees are required to sign the Volunteer Code of Conduct.
- Mentors and Mentees are expected to meet 4-6 times over the course of the Program. Many mentee/mentor pairs choose to continue their same meeting schedule after the conclusion of the formal Program.
- Mentors are expected to allot 1-2 hours per month to meet with Mentees at the discretion of each participant.
- Mentees are responsible for making initial contact, scheduling future meetings and any other meeting follow-up items.

Mentorship Program Roles and Responsibilities:

A successful mentoring relationship entails sharing responsibility in developing a structure for intentional learning. There must be a mutual understanding of the relationship goals and expected outcomes. Therefore, it is crucial to set mutually agreeable expectations at the onset of the relationship. Success also requires the support of an effective and accessible Program Leader.

Mentors	Mentees
<ul style="list-style-type: none">• Guide Mentees to identify goals• Contribute up-to-date knowledge• Be willing to share your experience• Build upon Mentees’ strengths	<ul style="list-style-type: none">• Identify realistic goals and outline timeframes• Communicate learning style• Take the lead in scheduling meetings• Be prepared for each meeting with your Mentor• Be accepting of constructive feedback

Trust and Communication

The mentorship relationship is built upon a foundation of trust and communication. Trust is key to building a relationship and encourages both parties to productively and confidentially discuss professional goals, ideas, and experiences. It facilitates open communication important in both establishing a clear understanding of each party’s expectations at the outset and discussing challenges encountered throughout the Program. Trust assumes that the disclosures of both the Mentor and Mentee will be held by each partner in the strictest of confidence.

Phases of the Mentoring Relationship

Getting to know one another	Cultivating the Relationship	Evaluation and Redefinition
<ul style="list-style-type: none">• Setting goals and establishing timeframe• Agreeing on a meeting format• On-going communication	<ul style="list-style-type: none">• Assessing progress• Providing feedback• Identifying goals for subsequent meetings	<ul style="list-style-type: none">• Assessing what has been achieved• Celebrating successes• Outlining further steps in development• Feedback to Program to enhance the Program

Suggested Meeting Topics

Please note that these topics are only guidelines for your meetings.

Meeting #1 – Introductions / Establishing a Relationship

- Discuss both of your career and educational backgrounds and progression
- Discuss your goals and expectations in the mentorship Program
- Decide on the best form of communication (i.e. phone, email) and best timing and frequency for scheduling future meetings
- Identify areas of confidentiality at the first meeting

Meeting #2 – Career Planning

- Continue your discussion about your, the mentor's, history
- Discuss mentee development plans including challenges and exploration of development opportunities
- Discuss skills necessary to achieve these goals and identify strengths/weaknesses

Meeting #3 – Work / Life Balance

- Discuss the challenges in achieving work/life balance
- Create a plan to ensure that the mentee can achieve professional success without sacrificing your personal/family life

Meeting #4 – Leadership / Teamwork

- Discuss the importance of leadership and teamwork as it relates to success
- Identify challenges you each face in being part of a team
- Discuss traits that make a good leader
- Determine how the mentee can improve their leadership skills

Meeting #5 – Upcoming Professional Challenges

- Discuss issues faced over the course of this year
- Discuss lessons that you have each learned
- Discuss other topics that you have not previously covered but wish to share with each other

Tips for Giving and Receiving Feedback

As part of a mentorship relationship, the Mentee not only invites from but also offers to his/her Mentor honest, constructive, and valuable feedback. This reciprocity is vital to achieving goals as well as the overall success of the relationship. Below are tips on giving and receiving feedback in ways that are impactful.

Effective Feedback:

- Is offered in a timely manner
- Emphasizes actions and offers solutions or strategies for improvement

Effective Feedback from Mentee:

- Informs the Mentor about how the advice received was beneficial
- Describes how the communication style and/or actions of the Mentor contributes to a positive mentoring experience

Effective Feedback from Mentor:

- Includes concrete observation of Mentee's strengths and assets
- Proposes areas of potential growth and development
- Suggests actionable next steps for progress (e.g. introduction to professionals with the skill set, books/reference material, etc.)

GETTING STARTED CHECKLIST

Before your first session

- Introduce yourself to them as soon as possible after accepting the role of mentor and before arranging the first meeting.
- Request for the Mentee to email a brief bio (just a few paragraphs) prior to the first meeting
- Consider your own experiences and background in light of your Mentee's career and life and reflect on areas of common interest and experience.
- After reading the Mentee's communications, jot down a few curious questions that you can use as conversation starters in the first session.
- Review Mentoring Resources and read "[Getting the Conversation Started: Open-ended Questions for Mentors](#)".
- Identify options in your calendar for regular mentor meetings or conversations so you can offer dates and times for future sessions during your first conversation.
- Suggest a date and time for your first meeting or conversation, specifying both the starting and ending time for the conversation.
- Start and end your first session on time to establish a good boundary with your Mentee.
- Convey your enthusiasm and make a personal connection via the tone of your email or phone communication. (e.g. "I look forward to getting to know you.") This will help relieve your Mentee of fears that he or she may be inconveniencing you.
- Follow up after the first session with a warm note of encouragement.
- Follow up immediately after the mentoring session with any actions to which you have agreed. Don't delay, as it is more likely to slip your mind as days pass.
- Confirm the date, time and location of next mentoring conversation.

FIRST CALL AGENDA

- Cover your respective understanding of the mentoring process.
- Discuss the boundaries of the relationship (confidentiality, etc).
- Encourage the mentee to think about what they want from the mentoring relationship.
- Encourage them to recognize the real meaning and potential of the relationship.
- Make sure that they understand that the sole purpose of the process is to meet their needs and expectations and that they need to communicate these to you.
- Let them know that, although you will probably take the lead in the initial stages, you expect this to change as the relationship grows and that they should eventually lead the process.
- Stress that confidentiality is of paramount importance and that you hope that, as the relationship develops, they will feel able to divulge all relevant information about particular issues if they want to get the best from you.
- Clarify and agree your respective understanding of the objectives at an early stage.
- Encourage them to maintain regular contact, even when things are going well.
- Review with them the information they have received about the process, about your role and about yourself. Don't assume they know everything or that they understand the mentoring scheme.
- Make it clear that you will be happy to give them any additional information they require.
- Discuss the strategy for maintaining contact.
- Go over the mentee's requirements.
- Encourage them to keep a general log for each session.
- Go over the process for organizing and confirming the next sessions.

- Ask them to send you three goals/takeaways they hope to gain at the end of your six months together (review these on your next meeting to discuss steps to making progress towards achieving them).
- Set up the time and date for your next meeting.

MENTORING PLAN

Mentor		Mentee	
Date			
Mentee Learning Goal			
How will the mentoring be delivered?			
Proposed Mentoring Outline			
Learning mini goals	Resources e.g. books, podcasts, meetings, trainings		Target Date

*Source: Taylor, M., & Crabb, S. (n.d.). Business coaching and mentoring.