



CROSS-GENERATIONAL AND REVERSE-AGE MENTORSHIPS – MENTORING GUIDE



INSPIRER

Inclusive workplaces for senior workers

Co-funded by the
Erasmus+ Programme
of the European Union



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INCLUSIVE WORKPLACES FOR SENIOR WORKERS
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KEY GOALS AND OBJECTIVES OF THE CROSS-GENERATIONAL AND REVERSE-AGE MENTORSHIPS - INTRODUCTION TO REVERSE MENTORING

INTRODUCTION

WHAT IS MENTORING?

WHY DO WE NEED MENTORING?

THE MAIN TYPES OF MENTORING

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1 KEY GOALS AND OBJECTIVES OF THE CROSS-GENERATIONAL AND REVERSE-AGE MENTORSHIPS - INTRODUCTION TO REVERSE MENTORING

INTRODUCTION

The present Mentorship Model and the corresponding online mentorship space are the tools to guide both older and younger employees to be able to have means for multigenerational interconnection, and exchange of information as well as acquisition of new skills and good practices and provision of feedback based on reverse age mentoring.

Guided by the present manual, companies can pair younger workers with older workers to provide mentoring on new technologies, like social media, and to share insights on the market for younger colleagues. This can build relationships across generations and result in a “mutual mentoring”, where younger workers mentor older workers, while older workers also mentor younger workers in areas of expertise.

The mentorship model targets both older and younger employees in a company, in order to motivate and engage them into providing guidance and expertise to each other. The corresponding online space will enable company leaders and HR managers to online pair their employees of different ages in order to provide each other mentoring on new technologies, like social media, and to share insights on the market of younger target groups.

The present mentorship model has been developed in cooperation of an international expert team from Slovakia, Hungary, Luxembourg, Greece and Germany within the framework of the Erasmus + project *Inclusive workplaces for senior workers (INSPIRER)*. The project is co-funded by the Erasmus+ Programme of the European Union, KA2 - Cooperation for innovation and the exchange of good practices, KA204 - Strategic Partnerships for adult education.

The aim of the project is to develop the necessary competencies and skills of company and HR managers in order to create, facilitate and maintain a multigenerational culture in their companies, where younger and older employees will be able to communicate.

The Mentorship model is part of a set of three outcomes of the Inspirer project, which form a complete service package on reverse mentoring in companies. These include:

- **Training course on multigenerational workplace culture**
- **360° assessment tool for multigenerational workplace culture**
- **Cross-generational / reverse-age mentorship model and platform**

The development was proceeded by a research based on questionnaires and focus group interviews looking for those focal points, needs and gaps on reverse mentoring, where more information and guidelines were needed. The results of the research could be read in the "Synthesis report on the multigenerational workplace culture training needs". (<https://inclusiveworkplace.eu/services/>)

This mentorship model is to be used together with the online mentorship space and the assignments for reverse mentorship.

WHAT IS MENTORING?

According to the Cambridge Business English Dictionary, mentoring is:

"The activity of supporting and advising someone with less experience to help them develop in their work:

We train people through one-on-one mentoring.

*Mentoring programs are a way to increase the company's competitive advantage."*¹

A mentor impacts a mentee's personal and professional growth in an organizational context. In most traditional mentorships, senior employees counsel more junior colleagues; however, mentors do not have to be more senior than the people they advise. What is important is that mentors have knowledge and experience from which others might benefit. The person providing the mentoring is the mentor and the individual receiving mentoring is called a mentee in the 2000s, but the term 'mentor' and mentoring is dating back to the ancient

¹ <https://dictionary.cambridge.org/dictionary/english/mentoring> Meaning of mentoring in Business English, **Cambridge Business English Dictionary** © Cambridge University Press, Accessed online October 20, 2021

Greek times, it was first mentioned in Homer's *Odyssey*.² Mentoring is a relationship-based practice that always requires communication, but its specific definition is very broad, with over 50 definitions in use recently.

WHY DO WE NEED MENTORING?

All organisations need to provide some form of career development in order to generate a succession of motivated, upward-moving employees. Mentoring is useful for a wide range of individuals and situations because it helps people to learn in a non-threatening environment. It also has a minimal direct cost. Mentoring is one of the fastest expanding approaches to the development of young people and people in managerial roles.

The word “mentor” originally comes from Greek mythology. Odysseus entrusts his infant son Telemachus to Mentor, his faithful friend, before he goes to fight in the Trojan War in this Ancient Greek epic poetry going back roughly 3000 years. Unexpectedly, he disappears for decades, and Mentor cares for and supports the youngster during that period.³ Contemporary mentoring, however, has its origins in the concept of apprenticeship to the master craftsman who passed down his knowledge of how a task was done and how to operate in the commercial world. Today, mentoring programmes are used to meeting the needs of a variety of different groups of employees, including:

- Young recruits for whom it offers an effective support system to help them with the transition from education to the world of work.
- Junior managers moving into a middle management role - mentoring can assist them in making the step into more senior and general management positions.
- Middle management and senior managers who benefit from advice and guidance as they transit from a task focus role to a functional and senior management post.
- Disadvantaged groups - many organizations use mentoring as a means of supporting specific groups such as ethnic minority groups, young people and people from disadvantaged backgrounds.

² <https://www.open.edu/openlearn/ocw/mod/oucontent/view.php?id=74475§ion=2>

³ Ibid.

THE MAIN TYPES OF MENTORING

One-to-one mentoring - This is the traditional model of mentoring where a mentor and mentee agree to establish a mentoring relationship to help the mentee develop, progress and achieve results. The mentor has greater experience in an area of interest to the mentee and can function as a counsellor and guide in this sort of mentoring.

Peer mentoring - In peer mentoring, colleagues of similar age and experience level mentor each other. Mentors can alternate between being 'mentors' and 'mentees', but overall peer mentoring is about developing a formal support system, learning together and holding each other accountable.

Group mentoring - This type of mentoring entails a single mentor working with a group of mentees. Group mentoring reaches and influences more mentees in a short period of time and is particularly useful when organisations are short of good mentors - it helps to promote a culture of inclusion. Practicing group mentoring also improves everyone's teamwork skills.

Team mentoring - Similar to sport, team mentoring involves a group of mentors and mentees who conduct mentoring sessions as a team. This type of mentoring can help promote diversity and inclusion by creating space for different people with different opinions and perspectives to meet and learn from each other. As with group mentoring, it is good for teamwork and avoids the risk of favouritism or elitism that one-on-one mentorship may sometimes bring.

Reverse mentoring - Reverse mentoring in the classical meaning is exactly what it sounds like when a junior person mentors a senior person. Every one-to-one mentoring relationship has the potential to benefit from reverse mentoring, as we can always learn a lot from each other. However, a reverse mentoring programme formalises and makes this process more accessible.

WHAT IS REVERSE MENTORING?

Reverse mentoring provides a valuable generational and cultural perspective for company leaders and employees and can promote inclusion by bridging the gap between age, ethnicity, culture and gender.

Many companies are developing age-based reverse mentoring programmes, where millennials help senior colleagues understand generational differences and learn new technologies. For example, in companies where technology is evolving

rapidly, it is common for junior employees to be more tech-savvy than their senior counterparts, and they are then assigned as mentors to provide training on social media and technology developments to their mentees higher up in the hierarchy.

Other reverse mentoring programmes focus on matching leaders from majority groups with junior colleagues from different ethnic and racial backgrounds, or heterosexuals with LGBTQ colleagues, or non-disabled colleagues with disabled colleagues. In all of these cases, mentors have individual and unique experiences that can provide valuable insights to their colleagues and can inspire other senior leaders to take action to break down barriers and promote inclusion.

In this type of reverse mentoring process, the mentor (often junior and from a diverse or underrepresented workforce) mentors the senior person on what it is like to work in the company as a member of an underrepresented group. Conversations about ethnical and LGBTQ issues, other minority aspects on the other hand, require expertise in equality, diversity and inclusion and need to be handled sensitively. This is why companies often launch their reverse mentoring programmes, first on age and technology, then later on gender and finally on other protected characteristics.

The learning and open opportunities for vitality provided by reverse mentoring are malleable and numerous, and the relationships developed between mentors and mentees can improve morale in the workplace and lead to collegial relationships that last long after the mentoring process is over. Nothing says "we value your skills and your contribution to the company" better than asking someone to share their knowledge and start coaching and inspiring others - starting with senior managers.

This table presents well the need for reverse mentoring at a US company that had introduced reverse mentoring programme with success in 2013. The shift between the ratio of generations is significant.

PERCENTAGE OF COMPANY WORKFORCE AS OF				
GENERATION	YEAR OF BIRTH	2005	2010	2015
MILLENNIALS	1982-2000	4	14	25
GEN XERS	1966-1981	43	44	44
BABY BOOMERS	1946-1965	53	41	31
TRADITIONALIS	1926-1945	3	1	0

Table 1: Workforce Projections Provided by The Hartford in 2012 (Source: Reverse Mentoring at The Hartford, Innovative Practice Brief, 2013 Accessed June 5, 2021 https://www.bc.edu/content/dam/files/research_sites/agingandwork/pdf/publications/hartford.pdf)

REVERSE MENTORING AT MICROSOFT NORWAY – A SUCCESS STORY

“Reverse mentoring helps me get insight into the next generation, who they are, what they value and how to communicate with them. I’ve never experienced anything like it in my career before.”

“We’ve gone much more digital, and I can see how that positively impacts our teams. We’ve changed the way we use social media, Yammer, and visuals in everything we do. We are continuously picking up a lot of new things.”

Michael Jacobs, General Manager, Microsoft Norway⁴

“It’s all about sharing thoughts, insight, raising questions and getting to understand each other.”

“Everything today is about collaborating, communication and being able to work together, and reverse mentoring really helps us get insight and understand each other.”

“It’s all about dialogue, balance, and trust, ”

Magnus Svorstøl Lie, a Partner Sales Executive employed via the Microsoft Academy of College Hires⁵

⁴ Microsoft Features: Reverse mentoring: How millennials are becoming the new mentors <https://news.microsoft.com/europe/features/reverse-mentoring-how-millennials-are-becoming-the-new-mentors/>

⁵ Ibid.

Microsoft Austria was the first to introduce a reverse mentoring programme in 2014, and after its success it had been expanded to Microsoft Norway and other European Microsoft groups quickly. Microsoft shared an insight of one reverse mentoring example from Norway in 2015, where Michael Jacobs, General Manager meets Magnus Svorstøl Lie, a Partner Sales Executive employed via the Microsoft Academy of College Hires (MACH) program on a regular basis (every two months) for one-on-one sessions in flipped style and cover a wide range of topics. Magnus creates the agenda for each meeting and ensures that it meets Michael's requirements. Michael receives coaching on a variety of issues, including new digital communication tools and workplace trends, while Magnus receives key leadership insights and a look at the big picture. The best way to provide a quick insight on the success of the programme is through citations:

"With as many as 5 generations working side by side in today's workplace, European leaders are confronted as never before with a growing generational gap, shifting expectations, as well as the constant need to stay on the cutting 'digital' edge. To help, more and more senior executives are turning to their younger colleagues for insight and guidance. Traditional mentoring as we know it has shifted into reverse, turning Gen Y into the must-have mentors for senior leaders who want to stay ahead."

"For Michael and Magnus, joining the program has helped broaden their horizons, build trust, share technical skills such as social media optimization, and even make concrete changes to day-to-day routines. Rethinking how the middle management communicates within the organization and empowering millennials to speak up with questions or concerns are examples of changes initiated by their conversations."⁶

Reverse mentoring is offering unexpected and often invaluable experiences for both participants, a great win-win situation for the participants and the company as well.

CROSS-GENERATIONAL REVERSE MENTORING INSPIRER MODEL

Based on the current and continuously changing needs of organisations and labour market, the INSPIRER project is using an improved model of reverse mentoring. The novelty in Cross-Generational Reverse Mentoring of INSPIRER is the attitude to form a mentoring programme that is equal in both directions, the

⁶ Ibid.

two or more participants are mentoring each other equally. This allows them to form a balanced relationship acknowledging that both or all participants have expertise they can share. This attitude is already present in recent articles on reverse mentoring, but in a more moderate way. The mentoring model developed under INPSIRER project is explicitly an equal, vice-versa relationship inside the mentoring pair or group.

ASSIGNMENT EXAMPLES UNDER INSPIRER PROJECT

A set of assignments were prepared for possible users under the INSPIRER project that are available at the project website (<https://inclusiveworkplace.eu/services/>) The selection is eased by key words from the 27 assignments, different topics and areas, methods are covered in the prepared assignments.

BENEFITS OF A SUCCESSFUL REVERSE MENTORING PROGRAMME

Better retention rate: Improving the retention of millennials is a key strategy that many organisations are struggling with today. Studies show that 43% of millennials plan to leave their jobs in the next two years. As the largest generation in the labour market today, their propensity to leave has a strong impact on organisations. Some organisations are tackling millennials' attitudes to leaving the workplace by launching a reverse mentoring programme.

But can this really have an impact on retention rates? For example, US financial services provider Pershing introduced a reverse mentoring programme in 2017. Following the rollout of the company-wide initiative, Pershing saw a 96% retention rate for 77 millennial participants⁷, meaning the reverse mentoring experiment was an absolute success.

Better engagement to company culture: A reverse mentoring programme helps mentors and mentees to become more connected to the culture of the organization. By pairing or grouping a junior employee with a senior manager, the organisation gives young people new insights into the organisation, helping them to connect with all aspects of the culture.

⁷ <https://www.forbes.com/sites/jasonwingard/2018/08/08/reverse-mentoring-3-proven-outcomes-driving-change/#3ec51efc8b51> Accessed June 21, 2021

Better inclusion: With reverse mentoring, organisations build inclusive relationships that don't take age, ethnicity or gender into account. This inclusiveness gives senior management a broader but more coherent insight into the employee team. For example, Procter & Gamble has paired senior managers with employees with disabilities in its reverse mentoring programme. During the mentoring process, it quickly became apparent that internal videos were not accessible to hearing-impaired employees. This was easily resolved with captions once senior managers were confronted with the problem.

Improved diversity in talent management: When different populations are paired or grouped in mentoring relationships, senior managers have the opportunity to have personal conversations about diversity. In the short term, this improves empathy and reduces biases stemming from a lack of knowledge. In the long term, these mentoring relationships are crucial to increasing diversity in senior management positions.

Promotes technology changes: Organisational change is difficult, and technological change is perhaps the most challenging change. Reverse mentoring provides an opportunity to drive change and encourage junior employees to challenge existing strategies and processes.

Encourages culture change: As the digital world continues to evolve, organisations know they need to keep up. Reverse mentoring gives them the opportunity to keep up with social and digital changes or even get ahead of trends through their junior employees. As an example, Estee Lauder CEO Fabrizio Freda introduced a reverse mentoring programme in 2018, the results of which prompted the beauty company CEO to focus more on social media influencers, and led to the launch of the knowledge-sharing portal Dreamspace.⁸

Other benefits of reverse mentoring include:

- Developing a learning culture
- Bridging generation gaps
- Developing the leadership skills of junior employees
- Sharing different perspectives
- Developing communication skills
- Developing self-confidence and self-awareness

⁸ <https://www.ft.com/content/d5d0819c-208b-11e8-9efc-0cd3483b8b80> Accessed June 18, 2021

FRAMEWORK FOR THE DELIVERY OF KNOWLEDGE: HOW TO SET UP A REVERSE MENTORING PROGRAMME

STEP 1: IDENTIFYING KEY OBJECTIVES, SETTING THE GOALS

STEP 2: DESIGN THE CROSS-GENERATIONAL REVERSE
MENTORING PROGRAMME

STEP 3: ONBOARDING THE PARTICIPANTS: JUNIOR AND SENIOR
PARTNERS

STEP 4: MATCHING EXPERTISE AND NEED, CREATING THE PAIRS
OR THE GROUPS

STEP 5. EXECUTE THE MENTORING OCCASIONS USEFUL TOOLS
IN THE MENTORING PROCESS



FRAMEWORK FOR THE DELIVERY OF KNOWLEDGE: **HOW TO SET UP A REVERSE MENTORING PROGRAMME**

The following steps are necessary to a reverse mentoring programme:

Step 1: Identifying Key objectives, Setting the Goals

Step 2: Design the Mentoring Programme

Step 3: Onboarding the Participants: Junior and Senior Partners

Step 4: Matching Expertise and Need, Creating the Pairs or the Groups

Step 5. Execute the Mentoring Occasions

+ 1 Step: Measure Success - Evaluation Procedures

In this chapter Steps 1-5 are described, and a separate chapter is dealing with the evaluation procedures and tips that are designed to measure success (see Chapter 4: Measure Success - Establish Evaluation Procedures) Of course these are the advised steps, but alterations are welcome based on the individual needs of the applying organisation.

STEP 1: IDENTIFYING KEY OBJECTIVES, SETTING THE GOALS

First of all, **define a clear goal for the mentoring programme at your company** to map what the main reasons for wanting to start a reverse cross-generational mentoring programme from an organisational point of view are. The goal setting is in the hand of the reverse mentoring programme developer. Here are some extra features that may be worth considering:

- Is there a low level of staff engagement?
- Is there a lack of learning and development initiatives among employees?
- Is it inefficient for functions and departments within the organization to collaborate and support one another?
- How is the climate of trust in your organization?
- Are there any talented grads who are leaving?
- Is your leadership team's gender and age distribution unbalanced?
- Do you want to improve and sustain employee skills and morale?

- Do you want to provide an additional source of guidance and support beyond what line managers can do?
- Do you want to enable employees to achieve ambitious career development plans?
- Do you want to develop and keep talent and skills, such as management and leadership abilities?
- Do you want to improve inter-departmental communication?

Secondly, set the goals for participants. Designing a reverse cross-generational mentoring programme with only the company needs in mind, rather than the employees, will likely fail. Employee engagement is crucial, these points shall be considered:

- **What are the benefits for the employees from the mentoring programme?**
- **Why should employees take part in it?**

This will help to align the programme with the people who will be most affected and help to attract participants.

Thirdly and finally, consider the results. You will not know if your programme has served its purpose unless you have defined clear measurements and tangible business outcomes. What outcomes do you want to achieve? How will you measure success? Also here think about what success looks like for the mentors and mentees, and how you will track their personal progress. Further details will be provided in Chapter 6 of this guide.



TIPS:

- **Make small research on the motivations:** When it comes to the participants in the programme, don't make any assumptions. Conduct some research at this point of the planning process to learn about the main reasons for your company's employees' interest in mentoring and what they hope to achieve by participating. This manner, you can tailor your programme to meet both your company's and your employees' needs.
- **Obtain the Commitment of Senior Management:** A mentoring scheme which does not enjoy the visible support of senior management will almost certainly fail. Without this support, employees will feel that the scheme is under-resourced, and that there is no authority behind it to support any recommended development activities. With senior management commitment, however, confidence will cascade down to mentors and mentees, who will be more likely to put their time, commitment and energy into the scheme. Senior management will want to see that mentoring will produce outcomes that are beneficial to the organisation and connect with its overall strategic vision and purpose.

STEP 2: DESIGN THE CROSS-GENERATIONAL REVERSE MENTORING PROGRAMME

The mentoring programme shall be designed before the pilot test. These main points shall be agreed inside the executing team:

Participants:

- What volume do you plan to have, how many spaces will be available? – Confirm the number of spaces.
- Is the participation based on signing up or selection from HR? – Define if participation open or closed.
- If it is based on signing up, how can people do it, what is the process? - Create a sign-up process.
- Who will participate? Identify the desired circle of participants.
- Decide how participants will be chosen.

Promoting steps:

- How will you encourage sign ups? Develop promotion materials needed.
- How will you launch the programme? Decide promotion channels.
- Identify key leaders to bring on board, engage them into the programme.

The Mentoring itself:

- How long mentoring process do you plan to have? Decide how long the mentoring will last.
- How will you match participants? Decide how participants will be matched.
- How will you train participants? Create a plan for training the participants.
- What is expected from participants? Confirm the commitment expected from participants.

Measuring success:

- How will you monitor progress? Decide feedback methods, decide frequency of feedbacks.
- How will you report success? Outline method for tracking progress.
- How will you measure success? Set measurement Key Performance Indicators.
- How will you report success? Outline method for reporting success.



TIPS FOR DESIGNING:

- Start small, begin with a pilot scheme. It is difficult to promise that everything will operate flawlessly the first time. Testing would be a great help to discover and fix any problems or challenges that develop, as well as learn from the mistakes. A pilot will limit errors to a small group of volunteer mentors who are personally invested in the development of others. In the long run, this will result in a more trustworthy, consistent, and robust mentoring process.
- Participating in the mentoring should be a voluntary engagement. However, a selection procedure must be established to assure a uniform quality among people who will participate in the programme.
- Determine who will participate and provide them training. Participants must be thoroughly versed with the mentoring scheme and what behaviours are and are not 'appropriate.' Training is crucial for both mentors and mentees. Mentors and mentees must have a thorough awareness of these aspects:
- The duration of the mentoring relationship (If mentoring is planned to last for a long time, it's essential to make that obvious from the start.)
- The distinction between mentoring and directing;
- The bounds of mentoring (psychological counselling, for example, goes beyond these boundaries);
- The skills required for effective mentoring;
- **Identify issues ahead of time:** Make a plan for what you will do if and when it happens: Conflict between the scheme's goals and the participants' hidden objectives; / a breakdown in the connection between the two participants; / obstructive behaviour on the part of a participant's management.
- **Duration and focus:** Mentoring usually lasts six months to two years, with one- to three-hour sessions held at least once a month, or one in every two month as rarest frequency. Although sessions are frequently planned around specific topics, they should not be so rigorous that mentees and mentors are unable to drift off into other areas of interest or concern

- Both parties should be prepared for their roles. Junior participants will need to be taught how to confront and challenge more senior players, while senior participants would need to learn how to accept these challenges. Junior mentors, in particular, may be hesitant to confront a senior colleague. It can be beneficial to provide them with some tools and information on this in preparation.
- Set guidelines and promote trust. Reverse mentorship necessitates each party's trust as well as a willingness to learn from one another. The goal should be to inspire people to step beyond of their comfort zones and attempt new ways of thinking, working, and acting. Think about how you'll prepare both sides in this regard.
- **Confidentiality:** Because the relationship should be kept private, do not reveal who the participants are unless both parties agree. Participants in the interactions work under the idea that all talks are private until otherwise agreed.

STEP 3: ONBOARDING THE PARTICIPANTS: JUNIOR AND SENIOR PARTNERS

After a detailed planning stage and after an optional, but feasible pilot test it is time to execute the promotion and the participants sections of the planning stage, namely:



Chart 1: Overview of Step 3: Onboarding the Participants (source: own creation based on several sources, see list of resources)



TIPS:

- Ease participation: One of the most difficult challenges for mentoring programme organizers is to accomplish all of the abovementioned work and then have poor participation rates. Mentoring programmes can only grow and prosper if they are effectively promoted and updated.
- Communicate the advantages to mentors and mentees. - Don't presume that people will understand why mentoring is important. To pique their curiosity, emphasize what they stand to gain.
- Remove as many barriers to entry as possible. - People may be hesitant to join a mentorship programme due to a lack of time, a concern of having their task doubled, or a fear of being unable to commit. Help your employees to be able to participate by removing the barriers.
- Obtain the support of key stakeholders and decision-makers. - Find the people in your company who have the most credibility and sell them the dream first. They will function as ambassadors for the programme and boost sign-ups if you can get them signed up and talking about it with others in the company.
- Offer training and preparation materials. - For many people, this will be their first mentoring. Offer training and preparatory materials to encourage as many individuals as possible to sign up for your mentorship programme. This will make people feel more informed, and so more willing to commit.

STEP 4: MATCHING EXPERTISE AND NEED, CREATING THE PAIRS OR THE GROUPS

Now that you have selected the candidates, you need to decide what matching strategy you will use to achieve the results. There are different ways of pairing or grouping the participants:

Types of Matching:

Manual Matching - The programme coordinator asks the participants a series of questions and decides who will be paired or grouped with whom.

Self-Matching - The mentored person finds his/her mentor or vice versa.

Hybrid Matching - This pairing or grouping method combines the above two methods: first, you use the questions that would be asked in manual pairing or grouping. Based on the answers you create a pool of mentors/mentees from which the participants can choose.

Random Matching - People are allocated at random from the other group of participants who have signed up for the programme. Pros: This method of pairing or grouping takes the least amount of time. But, be aware that there's a good probability the duo or group won't mesh well in terms of expertise or temperament.

Reverse mentoring often involves two people with very different experiences, backgrounds and cultures. Therefore, **ideal mentoring partnership is vital**. The pairing or grouping of the participants should be based on the objectives of the reverse mentoring programme. If the aim is to expand diversity in management and leadership culture, or to improve the employment experience of minorities, then mentoring should aim to pair a white senior management position with an employee of colour who can provide insight and perspective on issues related to barriers and discrimination. With the aim to improve gender representation at the organisation, pair a male senior manager with a participant who is possibly a female employee or a female employee of colour.



TIPS

- Define the parameters of reverse mentoring relationships. Whatever the goal of the programme, help the mentees and mentors to understand what they are being asked to do so that they can begin their relationship with a shared understanding of why they are meeting.
- Choose mentors who have good social skills and who have the confidence to interact with and teach senior managers. As this is not a typical situation for either party, the relationship can be a little awkward. It is important for everyone to step out of their comfort zone and be open about how to move forward. Mentoring is about learning new skills and competencies and this cannot be done in a reverse mentoring relationship unless everyone is willing and able to try something different.
- Do not pair people from the same team. This allows both parties to talk without the constraints of leadership.

- Review relationships regularly to make sure they are on track. It is too easy for both junior and senior participants to fall back into hierarchical patterns of behavior, so the execution team shall have regular reviews.
- Not all pairings or grouping will be successful, and this is to be expected. If challenges arise, the contact person should assess whether there is a way to improve the situation. If there is no way to overcome the problem, he or she should facilitate a clean, blame-free end to the pairing. If a pair broke up, the contact person should assess whether there is a possibility to make new pairings.

These skills of the participants may foster the success of the mentoring programme, but is also evenly important not to exclude employees if they are not fulfilling these requirements:

- People who are interested and willing to help others to develop and to improve (i.e., one willing volunteer participant is better than five 'press-ganged' ones.)
- People who are interested and competent in core skills such as coaching, counselling, facilitating and networking.
- People who have a good reputation for developing and supporting others either within the organisation or as a volunteer outside of the organisation.

STEP 5. EXECUTE THE MENTORING OCCASIONS

Having the detailed plan and the paired participants, now it is time to execute the mentoring occasions. As a starting point, these features shall be kept in mind.

Fix All Logistic Issues

Make sure you made all practical arrangements for:

- **Questions, problems, and clarifications** – some people may have concerns or be hesitant to participate; have answers to frequently asked questions on hand so that you can reassure individuals or address any complaints;
- **Propose a framework for their first meeting** – it is critical that mentoring get off to a good start. This will be made easier by clear message and a nice, encouraging first occasion.
- The **technology and equipment** required if mentoring is to take place virtually;
- The **rooms** (and equipment required) if mentoring is to take place in person.

Maintaining the Momentum of Mentoring

Now that the couples or groups are matched and linked, the mentoring programme is underway. But if you thought you could now sit back and let the mentoring relationships blossom on their own, you were sadly mistaken.

Mentoring can easily lose momentum, typically because the situation is new to all parties and not yet part of their routine. Guidance, structure, and inspiration are needed, such as reminding participants why they signed up. Without this, however, you can expect some participants to drop out. Therefore, it is of utmost importance to check the pairs that are formed and ask for reports and feedback.



TIPS

- At the beginning of the mentoring relationship, make sure that participants set clear goals for their pairs/groups or for themselves about what they want to achieve. This gives direction and purpose to the relationship and holds both parties accountable for achieving the goals.
- Successful mentoring programme stops are a great opportunity to celebrate any successes and make everyone feel part of something. If the programme has an end date or intermediate milestones, you can organise an event where everyone involved in the programme can come together to thank everyone for their participation. Rewards, attention and the power of community will reduce dropout.
- As mentoring often takes place offline, it is also difficult for programme managers to be transparent about the success of the relationship. Therefore, the use of a mentoring software can help overcome these problems, as all communication and goal-setting is done on the platform in this case. This makes it easy for both the participants and the programme manager to monitor the process.
- Creating a community around the mentoring programme also helps to maintain momentum. Send a regular newsletter to all participants in the mentoring programme, containing content on how to get the most out of the relationship, as well as personal development tips.

USEFUL TOOLS IN THE MENTORING PROCESS

In this section some practical tools, documents are offered that can make easier to organise the mentoring sessions. The tools are just suggestions, when designing your mentoring programme make a suitable selection what tools fits best into your mentoring programme, or make any amendments to suit your purposes best.

TOOL 1: THE MENTORING CONTRACT

A mentoring contract is a simple document setting out the nature and potential duration of the mentoring relationship between the participants. The aim of the contract is to clarify the relationship, to set boundaries and expectations of the relationship from the outset.

TOOL 2: MENTORING PROGRAMME BRIEFING SHEET

A successful mentoring relationship requires both participants to understand what the mentor and mentee role means, and what the mentoring relationship is and is not. This tool can be used to help set the expectations of the participants being in the mentee/mentor role about what they can expect from their mentor/mentee and what their own responsibilities are in the mentoring relationship.

TOOL 3: PREPARATION QUESTIONNAIRE FOR PARTICIPANTS

The purpose of the Preparation Questionnaire is double, both roles shall be assessed of the possible candidates: on one hand to help the participant being in the mentee role to reflect on what (s)he wants to achieve from the mentoring sessions. Time taken to complete this questionnaire is a valuable aid for the other party to understand the applicants aims and aspirations as a mentee. The precise content of the questionnaire is in terms of professional and personal skills, objectives, plans and desires. On the other hand, the mentor role has to be examined: the mentor-role questionnaire part is to help potential mentors to reflect on their suitability as a mentor. By completing the questionnaire, reflecting on the answers and/or discussing the answers with the mentor programme organiser or human resources department or specialist will help to clarify whether both-roles will fit to the participant or not. Here is a brief applicant profile form:

TALENT PROFILE FORM

Current role (3 to 5 statements)

- Job title
- Length of time at The Hartford
- Development goals (summarize 3 to 4)

Competencies (list 3 to 4)

Past experience (titles and accomplishments)

Education (schools, years of attendance and areas of distinction)

Background (birthplace, hobbies, and personal interests)

Chart 2: Applicant profile form as proposed at The Hartford ¹

TOOL 5: SWOT ANALYSIS

The SWOT (strengths, weaknesses, opportunities and threats) tool can be used to explore participating person's SWOTs and organisational SWOTs. It is a great tool for identifying areas for further exploration, discussion and development.

TOOL 6: MENTORING RECORD AND ACTION PLAN

Mentoring relationships usually last for a reasonably long period of time and meetings maybe held weeks or even months apart. For this reason, it is good practice to make a written record of the discussion and agreed actions.

The mentoring record not only reminds the participants about the discussion and agreed action points but provides an opportunity to reflect on progress and improvements resulting over the duration of the mentoring relationship. It is good practice for both parties to have signed and dated copies of the record as it is recognition that the two have agreed to undertake specific actions and share a common understanding of the outcome of the mentoring session.

TOOL 7: SETTING DEVELOPMENT OPPORTUNITIES

This tool can be used to agree specific development opportunities and tasks that the parties will undertake. By discussing and completing the questions, the pair or group agree on a plan designed to address a development need.

TOOL 8: AGENDA FOR THE FIRST MEETING

The first mentoring session is especially important for establishing the expectations and the structure and design of future mentoring sessions. During the first meeting, mentors and mentees should discuss and sign the Mentoring Contract and discuss the organisational context and the practical background of the sessions. It is important to have a clear, well-planned structure and agenda for the first meeting.



photo source: www.stocksnap.io

TOOL 9: ASSESSMENT SCHEDULES FOR A SERIES OF MEETINGS

Since the mentoring process will go on two parallel paths, it is important to provide help in the timing of the meetings and topics. As a starting point we suggest a 50%-50% time split between the two roles in the mentoring occasions. By doing so, both parties will have a feeling of competence and have enthusiasm about the programme. Keeping the first 2-3 occasions at a 50%-50% time split would enable the pair to focus on both roles. In later occasions they may change the time allocation, but it is important to keep in mind that mentor and mentee roles shall be equally represented in the process.

TOOL 10: MENTORING REVIEW AND ASSESSMENT QUESTIONNAIRE

This questionnaire can be used periodically throughout the mentoring relationship and/or at the end of the mentoring relationship. It can be completed by the participants together or independently. The questionnaire's purpose is to encourage the pair to reflect on the progress and quality of the mentoring relationship. It also serves to capture evidence of impact and performance and ideas to support continuous professional development for both the mentee and mentor.



GUIDELINES FOR THE COMMUNICATION OF PARTICIPANTS

GENERAL GUIDELINES FOR MENTORING PROGRAMME
GUIDELINES FOR MENTOR AND MENTEE ROLES
EXTRACT OF A POSSIBLE MENTORING CONTRACT



GUIDELINES FOR THE COMMUNICATION OF PARTICIPANTS

GENERAL GUIDELINES FOR MENTORING PROGRAMME

- Both parties will only enquire or intrude into the other's personal life by invitation, respecting their privacy and boundaries;
- They will not make excessive demands on each other's time; they will respect the time provided by programme;
- In the mentor-role (s)he will assist the mentee in achieving objectives, but will let the mentee 'lead' in setting and achieving his/her goals;
- Both will honour commitments, promises and will respect deadlines;
- Make sure that both parties communicate their needs and career aspirations clearly,
- Draw the attention not to make impossible demands on the time of each other, keep the timeframe of the mentoring schedule;

GUIDELINES FOR MENTOR AND MENTEE ROLES

Mentee Role Guidelines

- The mentoring can be a very valuable growth experience, the participants will be presented with an opportunity to develop existing talents and learn new skills which will facilitate advancement within the organisation. However, mentoring – like every other form of personal and professional development – is not a cure-all medicine.
- The relationship will only be effective if accompanied by a high level of input from both/all parties. When participants are disappointed with the results of a mentoring it is usually because their expectations of the relationship were unrealistic from the outset.
- Being in the mentee-role it is important to ensure that mentoring is the right development medium to meet the participants' needs, if there are doubts about it, provide opportunity to the participants to talk about it.

List of Expectations from the Senior Participant

- An opportunity to gain insight into the skills and mindset of more experienced staff;
- Opportunities to consult with a senior person in the organisation about career opportunities and develop a detailed career plan with them;
- Help in setting and achieving goals for progression within the organisation;
- Opportunities to work on priority projects that will help to build recognition within the organisation and develop competencies in areas aligned to the career plans of the mentee;
- Providing new perspectives on how the organisation works and the direction of the organisation's development;
- Providing the benefits of the advice, coaching and experience of a competent and respected person within the organisation;
- Giving a better understanding of the informal culture of the organisation and how to use networking to add value to the work;
- Possibly a trusted, confident and lifelong friend.

The Responsibilities and Objectives of the Junior Participant

Individual seniors will have differing styles and be better at certain roles than others.

Some guidelines to the junior participant:

- To deliver projects and objectives without neglecting other tasks;
- Avoid conflicts of authority between your immediate boss and your senior partner;
- Use responsibly the contacts and privileges granted by the senior, asking for his/her permission where appropriate;



photo source: www.pixabay.com

EXTRACT OF A POSSIBLE MENTORING CONTRACT

The mentoring contract is a useful tool to explicitly state what the mentoring sessions and the whole process will require from the participants, e.g.:

“We agree to commit ourselves to the development of a strong, trust-based mentoring relationship:

In the mentor role we commit ourselves to supporting the agreed learning goals and to help meet the partner’s career objectives by accessing appropriate learning resources and by personal support, and working for a trustful and honest mentoring relationship.

In the mentee role we commit ourselves to actively progressing the agreed learning goals and working for a trustful and honest mentoring relationship.”

Other important parts of the expectations and commitments could be fixed in the Mentoring Contract. We encourage you to use this tool to raise awareness on the whole mentoring process and the relationship.

4

MEASURING SUCCESS – ESTABLISHING EVALUATION PROCEDURES

USING KPIS IN MEASURING SUCCESS
TIMELINE AND METHODS OF MEASUREMENT
ANNUAL OR REGULAR REVIEWS



MEASURING SUCCESS – ESTABLISHING EVALUATION PROCEDURES

The final step in launching a mentorship programme is to assess its success in relation to its goals. Even if you haven't fully met your business's targets (employee engagement, for example), the good effects for the participants in terms of their personal development could still be overwhelming.

Two major groups to measure as an evaluation procedure:

- **The business objectives outlined** - Have you hit your Key Performance Indicators (KPIs) as a result of the mentoring programme?
- **Participants' personal development** - Did the senior/junior participant achieve their goals? What impact did the mentoring programme have on them? At this stage, it's also critical to gather input from all participants. Were the participants happy with the way their relationship turned out? Would they do it again? What could be improved about the programme? What were the biggest challenges? And so on.

If it is the first time you start a mentoring programme, you will discover a number of ways on how to improve and iterate the future mentoring programmes.

USING KPIS (KEY PERFROMANCE INDICATORS) IN MEASURING SUCCESS

Some common KPIs are easy to keep record on the performance:

KEY PERFORMANCE INDICATORS (KPIs) TO MEASURE THE SUCCESS OF A MENTORING PROGRAMME		
ENGAGEMENT	PROGRESS	BUSINESS KPIs
NUMBER OF ACTIONS SET	NUMBER OF GOALS SET	LEVEL OF EMPLOYEE ENGAGEMENT
NUMBER OF SESSIONS	NUMBER OF GOALS ACHIEVED	RETENTION RATES OF GENERATIONS INVOLVED
NUMBER OF PAIRS OR GROUPS	PERSONAL SATISFACTION LEVEL	PERFORMANCE RATES
TOTAL HOURS OF MENTORING	EXTERNAL FEEDBACK	OVERALL EMPLOYEE SATISFACTION
NUMBER OF SIGN UPS	NUMBER OF NOTES TAKEN	PARTICIPATION RATES
NUMBER OF ACTIVE MENTORING RELATIONSHIPS		
PARTICIPATION RATES		

Table 2. Key Performance Indicators to Measure the Success of a Mentoring Programme 1

Signs of a successful mentoring programme:

- High programme participation and low drop-out rate.
- High match satisfaction
- High goal accomplishment. Did the majority of mentees feel they accomplished what they set out to do?
- High programme satisfaction.
- High positive impact on brand impression.

TIMELINE AND METHODS OF MEASUREMENT

Some of the proposed KPIs could be monitored along the timeline of the programme, if possible, do measure these metrics before, during and after your mentoring programme.

Analytics

The engagement and performance metrics can be tracked via the used ICT tools or it is also possible to ask the participants to keep track continuously, and report at the end of a certain period.

Surveys

Surveys are the best way to collect qualitative data such as employee engagement, employee satisfaction and personal improvement. The number of goals set and achieved could also be checked regularly, and most of the KPIs could be monitored through surveys. It is totally up to the potential of the mentoring management team how they keep track of the processes, but it is inevitable to keep the records somehow. Certain applications could also be a good help in it, e.g., Guider, an enterprise mentoring software (<https://www.guider-ai.com/>).

Reports

Regular reports on the proceedings or as a minimum requirement a final report is needed to present the achievements of the mentoring programme both to company management and the participants. Creating reports linked to your objectives is also a great way of showing progress, use performance reports to show improvement.



photo source: www.stocksnap.io

ANNUAL OR REGULAR REVIEWS

It is evident that there is a need for a review after a certain amount of time when executing a Mentoring programme. We recommend that the program be evaluated on an annual basis against the following criteria:

- The goals set at the start of the scheme;
- The success or failure of mentoring relationships, as well as the reasons that contribute to either outcome.

Certain tools that were listed in section 2 will give good opportunity to collect subjective evaluation of the mentoring programme. Do include comments from all age groups, as this will help you alter or improve the scheme. Rather than being a one-time programme or project, successful mentoring should grow and be a permanent element of the organization's operations.



ANNEX I: THE HARTFORD CASE STUDY ON REVERSE MENTORING

ANNEX I: THE HARTFORD CASE STUDY ON REVERSE MENTORING

The US based Hartford's company was one of the firsts to imply reverse mentoring. These charts/ descriptions show a little insight on their ideas and scheme of the mentoring process. They implemented The Hartford's Reverse Mentoring Initiative which provided an outstanding example reverse mentoring, and introduced reverse mentoring with success in 2012-2013.

(Source: Reverse Mentoring at the Hartford: Cross-Generational Transfer of Knowledge About Social Media

https://www.bc.edu/content/dam/files/research_sites/agingandwork/pdf/publications/hartford.pdf

An overview of mentoring that Hartford was using in its programme to give a brief introduction:

MENTORING: AN OVERVIEW

- 1. Informal and formal mentoring are time-honoured strategies for occupational and career development.**
- 2. Mentoring is a variant of apprenticeships. It offers opportunities for one person to learn skills and expand professional networks as a result of a relationship with a colleague who has more knowledge and experience.**
- 3. There is substantial evidence that mentors often benefit from these relationships, too.**
- 4. Traditional mentoring is predicated on the assumption that older employees who are advanced in their careers can educate junior employees and move them up the corporate ladder.**
- 5. Reverse mentoring turns the paradigm of traditional mentoring around. Junior employees share skills and knowledge that senior staff need in order to do their jobs well and stay engaged.**
- 6. In both traditional and reverse mentoring, close relationships are formed that create a pathway for bi-directional learning by both the mentor and mentee.**

Chart 3: Mentoring Overview as proposed at The Hartford ⁹

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https://www.bc.edu/content/dam/files/research_sites/agingandwork/pdf/publications/hartford.pdf Accessed online June 18, 2021

DEVELOPING A CULTURAL CHANGE TO CONTEMPORARY TECHNOLOGIES AND PRACTICES AMONG SENIOR LEADERS AT THE HARTFORD COMPANY:

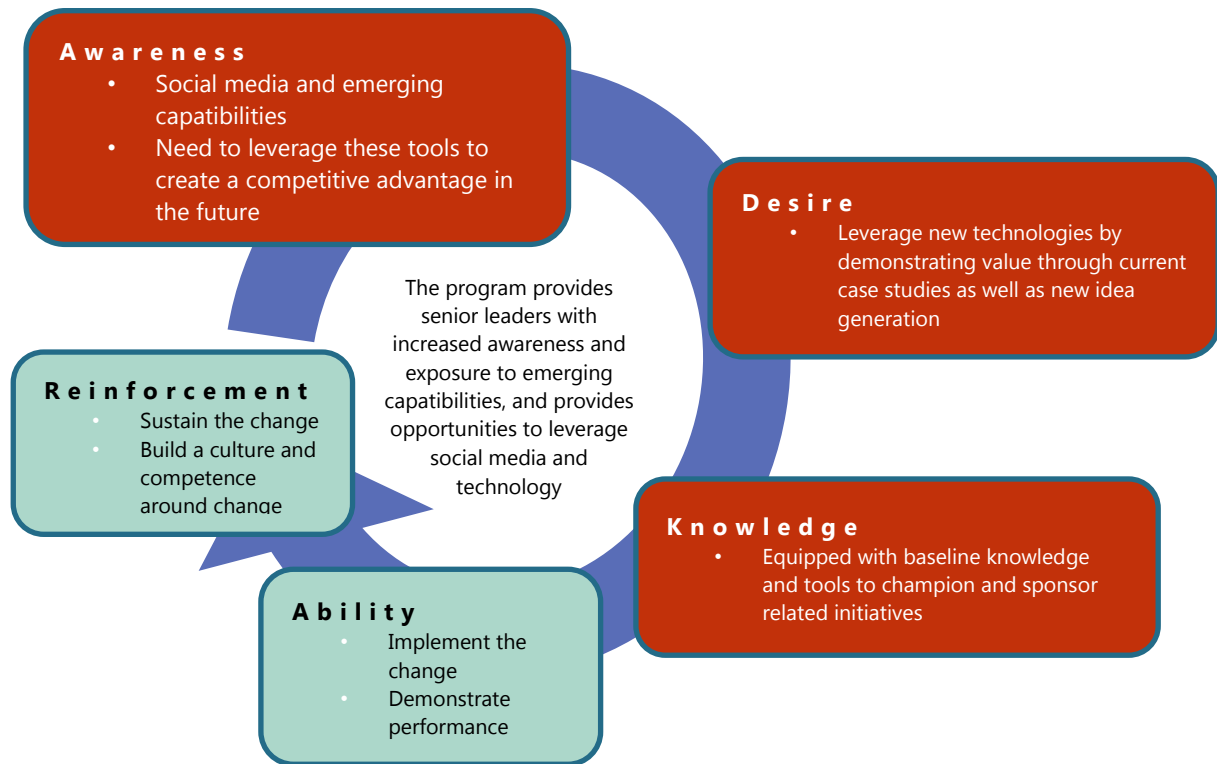


Chart 4. Developing a Cultural Change to Contemporary Technologies and Practices among Senior Leaders – The Reverse Mentoring program scheme is aligned with Prosci's ADKAR Model for change
source: https://www.bc.edu/content/dam/files/research_sites/agingandwork/pdf/publications/hartford.pdf

MENTORING PROGRAMME SETUP:

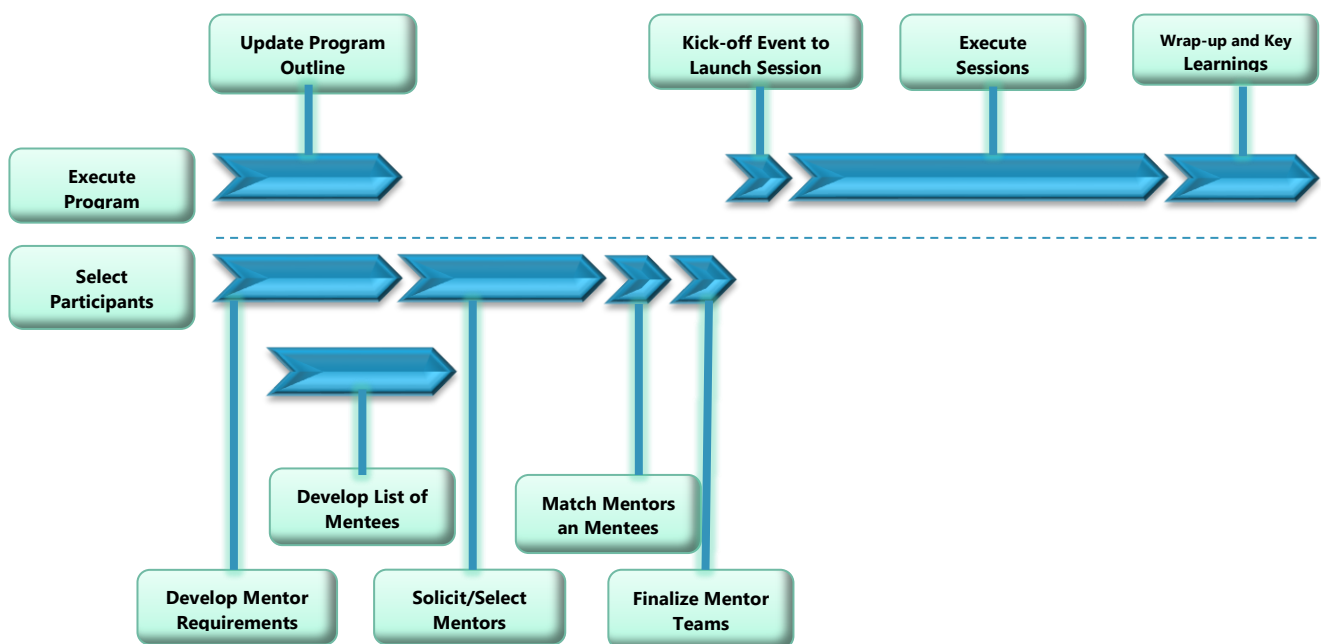


Chart 5: Reverse Mentor Cycle Process at The Hartford Company
source: https://www.bc.edu/content/dam/files/research_sites/agingandwork/pdf/publications/hartford.pdf

MENTOR GUIDELINES FOR HARTFORD REVERSE MENTOR PROGRAM (EXCERPT)
SESSION #1
PREPARATORY ACTIVITIES
RESEARCH THE MENTEE’S BACKGROUND USING GOOGLE, HARTFORD INTERNAL RESOURCES, LINKEDIN, ETC.
RESEARCH THE MENTEE’S LINE OF BUSINESS
REVIEW PROGRAM CURRICULUM
DRESS PROFESSIONALLY
THINK THROUGH CAREER ASPIRATIONS AND DEVELOPMENT GOALS AND PREPARE A TWO- MINUTE ELEVATOR PITCH
BRING THE FOLLOWING MATERIALS: • LAPTOP • RELEVANT MOBILE DEVICES • TALENT PROFILE AND FULL-LENGTH RESUME • PROGRAM CURRICULUM • ANY OTHER REFERENCE MATERIALS
ARRIVE 10 MINUTES EARLY
DURING THE SESSION
INTRODUCTION (ESTABLISH RAPPORT) • FAMILY LIFE, HOBBIES, PROFESSIONAL AND PERSONAL INTERESTS • BE SURE THAT YOU AND THE MENTEE SHARE INFORMATION EQUALLY, WITH A FOCUS ON LEARNING ABOUT EACH OTHER
ASK GENERIC QUESTIONS TO DETERMINE THE MENTEE’S FAMILIARITY WITH THE INTERNET • DO YOU HAVE A FACEBOOK ACCOUNT? A LINKEDIN ACCOUNT? • DO YOU PAY BILLS ONLINE? SHOP ONLINE? GET STATEMENTS ONLINE? • DO YOU WATCH YOUTUBE? WHAT’S YOUR FAVORITE? • DO YOU READ BLOGS? ANY RSS FEEDS? (ETC.)

REVIEW CURRICULUM WITH THE MENTEE DETERMINE THE MENTEE’S FAMILIARITY WITH AND LEVEL OF INTEREST IN THE FOLLOWING: • TECHNOLOGY AND DEVICES • NETWORKING, CONNECTIONS, AND COMMUNICATION • FINDING INFORMATION (SEARCH ENGINES) • SHARING AND COLLABORATION • MULTIMEDIA (AFTER THIS SESSION, MENTORS WILL COMPLETE A SURVEY TOOL NOTING THE MENTEE’S RESPONSES. AT THE END OF THE PROJECT, PRE- AND POST- PROGRAM DATA WILL BE COLLECTED AND COMPARED.)
DISCUSS THE MENTEE’S BUSINESS PRIORITIES FOR THE YEAR IN TERMS OF THIS QUESTION: • WHERE ARE THE TECHNOLOGY AND SOCIAL MEDIA OPPORTUNITIES TO AID EMPLOYEES AND CONNECT WITH CUSTOMERS?
AFTER THE SESSION
WRITE SESSION NOTES WITHIN THREE DAYS, AND POST THEM ON PROJECT DISCUSSION BOARD
SEND A FOLLOW-UP EMAIL MESSAGE TO YOUR MENTEE • MENTION A TOPIC OF INTEREST TO YOUR MENTEE • GIVE LINKS TO READINGS FOR THE NEXT SESSION • DETAIL ANY OUTSTANDING ITEMS/QUESTIONS DEFERRED TO THE NEXT SESSION • SUGGEST TOPICS FOR FUTURE SESSIONS

Table 3: Mentor guidelines for Hartford Reverse Mentor Program (excerpt)

source:

https://www.bc.edu/content/dam/files/research_sites/agingandwork/pdf/publications/hartford.pdf

RESOURCES:

<https://hbr.org/2019/10/why-reverse-mentoring-works-and-how-to-do-it-right>

<https://www.insala.com/blog/5-benefits-of-a-successful-reverse-mentoring-program>

<https://www.forbes.com/sites/jasonwingard/2018/08/08/reverse-mentoring-3-proven-outcomes-driving-change/#3ec51efc8b51>

<https://www.guiders-ai.com/blog/types-of-mentoring>

<https://www.guiders-ai.com/blog/how-to-start-a-mentoring-program>

<https://www.guiders-ai.com/blog/why-everyone-needs-mentoring-in-the-workplace>

<https://www.guiders-ai.com/blog/how-to-match-mentors-and-mentees>

<https://www.guiders-ai.com/blog/how-to-measure-the-success-of-a-mentoring-programme>

<https://chronus.com/blog/guide-measuring-mentoring-program-success>

<https://www.managers.org.uk/wp-content/uploads/2020/03/CHK-082-Developing-a-mentoring-scheme.pdf>

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Reverse Mentoring Tips and Best Practices, Diversity Best Practices, DBP Research Request

https://internationalwim.org/wp-content/uploads/2021/03/research_report_-_reverse_mentoring_tips_and_best_practices.pdf

<https://www.sap.com/insights/hr/why-mentors-matter.html>

<https://www.open.edu/openlearn/ocw/mod/oucontent/view.php?id=74475§ion=2>

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Microsoft Features: Reverse mentoring: How millennials are becoming the new mentors

<https://news.microsoft.com/europe/features/reverse-mentoring-how-millennials-are-becoming-the-new-mentors/>

https://www.bc.edu/content/dam/files/research_sites/agingandwork/pdf/publications/hartford.pdf

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