



# HOW TO BE AN EFFECTIVE AV MENTOR

An internal mentoring program to help AV organizations recruit, retain, and develop new employees and a future generation of AV industry leadership.

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# HOW TO BE AN EFFECTIVE AV MENTOR

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# HOW TO BE AN EFFECTIVE AV MENTOR

## Introduction

Thank you for downloading *How to be an Effective AV Mentor*. Though this handbook will not resolve all of your recruitment, employee development, and retention challenges, it will help you build a foundation for employee engagement based on the tools in this program.

This guide provides a template and strategy for a mentoring program that you can customize for the size and nature of your organization. Though it provides the basic tools that will make it easier to build future leadership and a driven workforce, the most important elements in the program are your choice and development of a trusted mentoring team that will engage new or recently hired employees. It will also help you develop those who are transitioning to new or unfamiliar roles in your organization.

Mentored employees become engaged employees and are more likely to develop into leaders.

According to Gallup Research, when employees are engaged, they are passionate, creative, and entrepreneurial, and their enthusiasm fuels growth. Companies with engaged workforces are 50% more profitable than their peers and retain a higher percentage of their employees.

But engagement requires self-confidence. So how do you help a new hire – or even a current employee – become confident enough to actively participate in your organization's mission?

Mentoring is the first stage of building that confidence. This handbook will take you through a step-by-step process of building your own mentoring program.

## STEP 1: Have a Strategic Purpose

### Goals, Action Plan, Reporting

Every mentoring program must have **goals**, an **action plan**, and **reporting**, which serve two purposes: **focus** and **accountability**.

Before you begin, *clearly define what you want to accomplish*. Engage your management team to contribute and make certain that they buy into the objectives.

Are you trying to retain employees? Attract more diversity? Nurture future leadership? Are you concerned about future growth? (Example: You have to develop someone to eventually take over sales management, engineering, finance, or customer service). You can't do any of that unless employees stay, and they tend to stay *if they're mentored and guided down a career path*.

You might want to improve the productivity, skills, and engagement of current employees. Does a technician need to develop social skills or assertive behavior to grow into a project management role? Does a less-than-productive salesperson need help with appearance, teamwork, and time management? Have you promoted an employee to manage former peers, and they need to develop more effective leadership skills? *Any of these can be mentoring goals*.

One of the most important goals of a mentoring program is to *stimulate employees to become passionate and engaged in your business*. This is not "feel-good" thinking. Mentoring creates an environment where the mentored employee can experience change and develop a sense of **psychological safety** – a feeling that they are in a place where it is safe to be themselves, with the freedom to engage and contribute without being shut down.

Mentoring supports that sense of psychological safety in new employees because it prevents isolation when developing and learning. A relationship with a trusted mentor relieves the stress of uncertainty. Confidence in decision-making and creativity increase so that every potential organizational or customer experience with that employee has a greater chance of success.

The sense of psychological safety also contributes to *building effective teams*. You may not always find the "best people," but you can use mentoring to develop the **best teams**. Employees' confidence in their ability to contribute can allow a team to perform at a higher and more productive level than any individual employee.

The next section is your starting point for your ACTION PLAN AND REPORTING – but, before you begin, you must establish your **GOALS**. Use the chart on the next page as a way to visualize what you want to accomplish.

## STEP 1: Have a Strategic Purpose, continued

### Sample Goal Worksheet

What do you want to accomplish with this program? These empty cells will allow you to note your objectives, but you can use a dry-erase board or Post-it® notes as well. Make certain you elicit ideas from your management team and they endorse the strategy. (List all you want, but keep it simple and focus on the three most important.) Some suggestions are listed in the first two rows to get you thinking. Circle them if you want to use them.

<i>Build a team</i>	<i>Hire more women</i>	<i>Develop future management</i>	<i>Improve employee retention</i>
<i>Develop current employees to take on new responsibilities</i>	<i>Replace retiring or transitioning staff</i>	<i>Improve staff social skills</i>	<i>Build a higher level of employee engagement in the company mission</i>

Keep your goals simple, scale them to the size and nature of your business, and make sure they're in line with the organization's mission. The mentee's immediate supervisor must endorse and cooperate with the mentoring effort, and understand the nature of the program and the goals. It is important that the mentee's supervisor also participate in goal setting apart from the usual training and daily job-skills development that are the supervisor's responsibilities.

After their first few meetings, the mentor and mentee will also be able to identify and target other personal development objectives (like social skills, tribal knowledge, presentation skills, and time management).

## STEP 2: Choose Your Mentors

### Establish the Mentor's Role

A mentor can be a sounding board to a mentee – someone with whom they might have a more open conversation than their boss. This allows for confidential discussions without being evaluated or judged.

The mentor should not fix problems, act as a go-between, or do the mentee's work. The mentor's responsibility is to guide and accelerate development. A new employee does not know what they are supposed to know, so a mentor is an interpreter to the AV industry, company culture, and best practices – but equally as important to tribal knowledge.

What are the mentee's expectations? A new or inexperienced employee needs someone to listen and give feedback. They are interested in people and their roles, whether it is a co-worker, customer, or vendor. Outside of large manufacturers, our industry is not known for its career mapping, but a new employee expects career guidance. Employees want to know how they can advance and acquire the skills that are important for job growth.

Finally, anything other than confidentiality will weaken or make that mentor/mentee relationship ineffective. There may be conversations that the employee does not want to go beyond the mentor. Each person has to honor that commitment.

### Who Do You Want to Clone?

Begin with people in your company whose behavior and attitude you want to duplicate. They're engaged, they like their work, and they have experience and understand the company culture. Mentors are people whose attitudes, engagement, tribal knowledge, and understanding of the organization's mission are qualities you want new employees to emulate.

*A mentor should not be the employee's (mentee's) supervisor; however, they can be someone else's supervisor. Mentors do not have to be managers, nor are they another layer of supervision. There must be buy-in by the supervisor to the organization's goals for the mentoring program – and know that their employee recognizes that he or she has ONE supervisor, not two.*

This is not training. Mentors don't have to share the same positions or responsibilities of the new or transitioning employee. An engineer can mentor a salesperson, or a salesperson can mentor an installer or tech. In fact, a mentor's own performance and development will advance if you don't cubby-hole them to mentor in a single job category.

## STEP 2: Choose Your Mentors, continued

### Sample Mentor Choice Worksheet

Don't worry about training the mentors. We will cover their "orientation" later. Just list your choices on a chart like the one below. The first two rows are examples.

Potential Mentor Name	Qualities	Availability
"Jim"	<i>Focused, great with co-workers, understands how the organization functions. 16-year employee.</i>	<i>Maybe Monday afternoon or Friday morning</i>
"Ellen"	<i>Generous with her time, comfortable in customer-facing situations. Team-oriented. 4-year employee.</i>	<i>Monday afternoon, Wednesday afternoon</i>

## STEP 3: Action Plan & Timeline

### Start the Program – Just DO It

Remember that your mentoring program must have a *strategic purpose for the organization*. The key elements to remember are to make it: **specific** to what you want to accomplish, **measurable** to know you have met your goals, **realistic** based on resources, and **time-bound** to establish results.

Your biggest obstacle to mentoring is assuming there *“is just not enough time,”* so this handbook *provides you a template*. You don’t have to “set up” or design anything, or spend money on materials or professional advice. With this guide, you can *immediately begin your program*, and tweak it as it grows. The intention is to keep it simple and at minimal cost.

Modify whatever part suits your organization’s culture and mission, but use this handbook to eliminate the time and effort needed to build a mentoring program from scratch.

### Mentoring: When to Start

**Mentoring begins 45-60 days after hire and lasts 6 months to a year**

Before you assign a mentor, a new employee *must have time to engage with his or her supervisor and co-workers*. The **supervisor’s role is established first**, with a clear understanding of who the employee reports to. The employee should also become familiar with colleagues and understand their responsibilities.

## STEP 4: Follow the Plan

### Three Stages of Development

There are three stages of a new employee’s development. The first is where they focus on themselves. They may doubt their qualifications, how they fit in, whether they made the right choice. They wonder if they will ever learn enough to contribute, along with all the other self-doubts that we experience in a new environment.



Mentoring’s job is to take them to stage two when they are confident enough to become engaged with the organization and its mission – and, finally, to stage three to build relationships with your organization’s customers and completely focus on customer engagement.



## STEP 4: Follow the Plan, continued

### CUSTOMIZABLE DOCUMENTS & WORKSHEETS, continued

#### Organization and Mentor/Mentee Documents to Measure Progress

Why do you need these? The organization worksheet covers goals, mentor choices, and progress. The mentor/mentee agreements act as “contracts” and explain their respective roles and responsibilities, as well as the general impact the program will have on the organization.

The worksheets are planning guides to provide criteria for goal-setting and progress reviews. The mentee’s form should be completed first, after which the company’s goals are added by whoever is administering the program. Those goals are established by the organization with the mentee’s direct supervisor and will help with the next step, which is choosing the right mentor, who then completes their worksheet based on the organization and mentee agendas. There are also help guides for the mentor, including talking points and tips on connecting with the mentee.

Mentors should be submitting copies of weekly or monthly meeting reports to you so you can maintain a regular dialogue with your team and the mentee to modify your approach if needed. Every quarter, you and the mentee’s supervisor, along with the mentor, should measure, fine-tune, and evaluate progress, and make certain that the organization’s goals are being met. You can use the chart on the following page to keep up with those benchmarks. Again, customize it to your needs.

At the end of the mentoring period (6 months to one year) you should meet with mentored employees and discuss their views and the benefits of the program, and to solicit their ideas on what worked best, what did not work, and how to improve it, as well as their next steps as a company employee. If the mentoring program is effective, you are going to notice the growth and engagement of the employee without even seeing a progress report.

The documents on the following pages can be customized to the needs and scope of your program. There are worksheets for the organization, mentor, and mentee. They are designed to help you follow your plan and stay consistent.

Also included are mentor guides to “breaking the ice,” mentor and mentee agreements that spell out their respective responsibilities, planning guides, checklists, mentor training tips, and a final section on mentoring alternatives if you just don’t have the bandwidth. Use all or a few. These are tools you don’t have to create so you can concentrate on the success of your mentoring efforts.

## STEP 4: Follow the Plan, continued

### CUSTOMIZABLE DOCUMENTS & WORKSHEETS, continued

#### Organization Progress Review Worksheet *(every 90 days)*

(Mentor's name)	(Mentee's name)	(Date)
Organization Goals	Progress and Notes	On track? Change?
Goal A		
Goal B		
Goal C		

**Next review date.** \_\_\_\_ / \_\_\_\_ / \_\_\_\_

**Agenda List.** List action items that the organization wants to cover in the next review.

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## STEP 4: Follow the Plan, continued

### CUSTOMIZABLE DOCUMENTS & WORKSHEETS, continued

#### **Mentor Agreement** *(Give to the mentor at the start of the program)*

You have been asked to serve as a mentor. It is an important role because of its contribution to building and nurturing the next generation of leadership for our company, as well as the AV industry. You were chosen because of your knowledge, integrity, and stature within our organization and the natural leadership qualities that you have exhibited during your tenure.

As a mentor, you will be entering into a temporary partnership with a mentee. Your role is to share your expertise, act as an objective advisor, and support his or her professional development as they grow and contribute to the success and profitability of our organization.

You are not the mentee's supervisor or manager, nor will you participate in any management decision concerning the role, status, or responsibilities of the employee, whose direct supervisor is responsible for direction and performance goals, as well as determining job duties and accountability.

For the term of this program, your responsibility is to help the mentee become a successful member of our team and advance his or her knowledge and career in our organization.

We know that successful mentoring relationships are based on mutual trust and common interests so our expectations for progress are realistic. To efficiently use the limited time of your mentoring partnership, we have provided this planner and regular meeting worksheets to measure progress toward the organization's and the mentee's goals. Every quarter, you will complete and submit these so that the company can evaluate the program's effectiveness. The worksheets are self-explanatory and require you to stay on task and on schedule.

I accept my role as a mentor as described above and agree to the confidential nature of the mentor/mentee relationship.

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Date \_\_\_\_ / \_\_\_\_ / \_\_\_\_

## STEP 4: Follow the Plan, continued

### CUSTOMIZABLE DOCUMENTS & WORKSHEETS, continued

#### Mentor Planning Guide

Date \_\_\_\_ / \_\_\_\_ / \_\_\_\_

Use this to help manage your mentee meetings, guide your discussions, and chart progress.

**1. Agenda.** List the areas that appear to challenge (or have challenged) the mentee or that you want to discuss.

**2. Update.** Review your progress. Since your last meeting, is the mentee more comfortable and less challenged?

Do you have any new concerns you want to address?

## STEP 4: Follow the Plan, continued

### CUSTOMIZABLE DOCUMENTS & WORKSHEETS, continued

#### Mentor Planning Guide

**3. Planning Ahead.** Discuss the upcoming projects or tasks where the mentee might need support and assistance.

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**4. Goals Check.** List goals that you feel the mentee should consider since your last meeting.

Goals	Actions	Resources

**5. Next meeting date.** \_\_\_\_ / \_\_\_\_ / \_\_\_\_

**6. Agenda List.** Briefly list a few action items that you want to cover in your next meeting.

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## STEP 4: Follow the Plan, continued

### CUSTOMIZABLE DOCUMENTS & WORKSHEETS, continued

#### Mentor Training Tips

##### Breaking the Mentoring Ice and Building Trust

How do you start the mentoring conversation with your mentee? Try the “**tribal knowledge**” conversation for starters. How often have you thought, “If only I’d known that when I was starting out”?

Share tribal knowledge about the office, your company culture, and the industry, such as:

- **Big Influencers** – The org chart is not the whole story. Give your mentee some advice on who those staff members are with big influence on how things work or when new ideas are accepted. Identify the most engaged employees: the ones who contribute all the time, no matter what their job description. Your mentee can learn from watching and interacting with them.
- **Language** – Help to explain AV industry jargon – especially the TLAs (three-letter acronyms) used to describe AV technology functions and products.
- **Organizational Culture and Values** – Discuss the preferred technologies and software that are used for presentation, reports, quotes, inter-office memos, email ... and other hints about dress code, events that should be attended, communication styles, and values.
- **Bread-and-Butter Products and Services** – What products are the mainstay of your company’s offering? Show how to find resources that will help explain and illustrate the functions of the products or services in a “self-study” way.
- **Internal Projects** – Help identify the internal programs intended to make changes or improve processes that are strategically important to the organization.
- **Unidentified Resources** – Build awareness of professional development and networking opportunities within and outside the company that are important to career development and networking, including annual conferences, company-paid training, and industry shows.
- **LISTEN!** – If you can ask one question that will cause your mentee to engage in a meaningful dialogue, that is the first step toward trust.

## STEP 4: Follow the Plan, continued

### CUSTOMIZABLE DOCUMENTS & WORKSHEETS, continued

#### Mentor Training Tips

##### Mentoring Check List

- ☐ Ask open questions: “Can you tell me about your week/month/day?”
- ☐ Help them clarify their goals and objectives – but *don’t dictate* them.
- ☐ Be patient – help the mentee arrive at his or her own answer.
- ☐ Resist the temptation to give unsolicited advice.
- ☐ Share experiences and *tell stories*.
- ☐ Don’t assume your mentee knows what they are “supposed” to know – this is when to share tribal knowledge.
- ☐ Don’t play the role of the “expert” or the mentee feels less empowered.
- ☐ Encourage the mentee to set the agenda, initiate meetings if needed outside of the schedule, and become self-reliant.
- ☐ Challenge them to *leave their comfort zone* and experience change.

##### You are a Mentor, not a Coach

###### *What is the difference?*

1. Mentoring is *relational* while coaching is functional.
2. Mentoring is *developmental* while coaching is remedial.
3. Mentoring is the “*why*” while coaching is the “*how*.”
4. Mentoring is long-term while coaching is short-term.
5. The mentor will:
  - Listen
  - Question
  - Summarize
  - Seek options
  - Ask for priorities
  - Challenge

##### Mentoring is Not Always a “Scheduled Event”

###### *You may be unavailable, but at least be approachable*

You could be asked for advice and guidance at any time. Part of the mentee’s development and success toward the organization’s goals is *how comfortable you make them feel in approaching you*. It won’t always be convenient, and they will have to learn how to respect your time and boundaries, but that is also part of their growth.

## STEP 4: Follow the Plan, continued

### CUSTOMIZABLE DOCUMENTS & WORKSHEETS, continued

#### **Mentee Agreement** *(Give to employee at the start of the program)*

We believe that our mentoring program will help build and nurture the next generation of leadership for our company, as well as the AV industry. You have been assigned a mentor who will help you develop your role and become a fully contributing member of our team.

We know it's not easy to be comfortable in a new setting or circumstance, and we know you will come to appreciate the efforts of your mentor to help you achieve a greater level of understanding and performance in your position.

Your mentor was chosen because of knowledge, integrity, and stature within our organization, and the leadership qualities that we feel will guide you as you build your career in the AV industry.

For the term of this program, you will be entering into a partnership with your mentor, who will share expertise, act as an objective advisor, and help you grow into a role that contributes to the success and profitability of our organization.

Your mentor is not your supervisor or manager and will not participate in management decisions concerning your status or responsibilities. Your direct supervisor is responsible for your direction and performance requirements and will determine your job duties and accountability. Your supervisor endorses and participates in the mentoring program, and collaborates with management and your mentor to establish goals and objectives in keeping with the organization's mission.

We know that mentoring relationships take time to develop and are based on mutual trust and common interests, so our expectations for progress are realistic. To efficiently use the limited time of your mentoring partnership, we have produced this planner and regular meeting worksheets to help guide you and your mentor to measure progress toward your goals. Your mentor will submit these at the end of each quarter.

The worksheets are self-explanatory and require you to stay on task and on schedule.

I accept my role as a mentee as described above and agree to pursue the professional and personal goals established through this program.

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Date \_\_\_\_ / \_\_\_\_ / \_\_\_\_



## STEP 4: Follow the Plan, continued

### CUSTOMIZABLE DOCUMENTS & WORKSHEETS, continued

#### Mentee: Elements of the Program and What to Expect

Throughout your program, meetings with your mentor are going to follow certain guidelines to help you develop your talents and fulfill professional contributions to your employer and colleagues. Your development will be measured based on the progress you make toward your employer's and your own objectives.

Remember that it is *your* initiative and drive that make your mentoring experience a success.

In your meeting and sharing process:

#### The Mentor Will:

- Listen
- Question
- Summarize
- Seek Options
- Ask for Priorities
- Challenge You

#### You Will:

- Inform
- Clarify
- Listen
- List Options
- Select Goals
- Prioritize

Take advantage of the time you will have with your mentor to develop the knowledge and confidence to be free to fail, try and learn, grow, and develop your talents. It is not going to happen overnight, and the process may seem agonizingly slow; as you mature into your position, however you will experience change and discover a lot about yourself that you never knew.

## STEP 4: Follow the Plan, continued

### CUSTOMIZABLE DOCUMENTS & WORKSHEETS, continued

#### Mentee Planning Guide

Date \_\_\_\_ / \_\_\_\_ / \_\_\_\_

Use this to manage your mentoring meetings, guide your discussions, and chart progress.

**1. Agenda.** List the areas that challenge you or you want to discuss.

(Don't overthink this part. Just be honest with yourself before you discuss it with your mentor.)

**2. Update.** Review your own progress since your last mentoring meeting. In which areas are you now more comfortable and less challenged? Do you have any new concerns you want to address?

## STEP 4: Follow the Plan, continued

### CUSTOMIZABLE DOCUMENTS & WORKSHEETS, continued

#### Mentee Planning Guide

**3. Planning Ahead:** Discuss upcoming projects or tasks. Where do you think you might need support and assistance? This is not the time to be bashful about asking for help.

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**4. Goals Check.** Track several immediate work goals and at least one long-term goal. You may want to focus on building technical, professional, or social skills; tribal knowledge; understanding the company mission; and the culture of the AV industry.

Goals	Actions (What you want to do, who will help?)	Status (to begin, progressing, or completed)

**5. Next meeting date.** \_\_\_\_ / \_\_\_\_ / \_\_\_\_

**6. Agenda List.** Briefly list action items that you want to cover in your next meeting.

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## STEP 4: Follow the Plan, continued

### CUSTOMIZABLE DOCUMENTS & WORKSHEETS, continued

#### Mentee Discovery

Since the last meeting with your mentor, you have learned or discovered some key things about your organization, your job, your colleagues, and yourself. These might be major lessons, meaningful conversations, things that have inspired or disappointed you, people you want to meet, or things you want to change. You *don't have to complete every box, but tell us what you have learned about.*

#### The Organization

#### Your Job

#### Your Colleagues

#### Yourself

## Conclusion: If You Think Your Organization ...

### Is Too Small?

#### Try Flash Mentoring

Flash mentoring is not extemporaneous – and it is not performed in a vacuum. Your organization still needs a formal mentoring effort, with planning and goal-setting for both the organization and the employee. But if there are only three or four of you, and the owners or managers are also pulling and terminating cable or fixing the roof – there is not a lot of time in the week to dedicate to formal mentoring and reporting.

Flash mentoring is not easy, but it can be very effective. Flash mentoring consists of a series of short, focused conversations about specific questions that usually last anywhere from 10 minutes to half an hour.

There are two methods to flash mentoring. One method takes advantage of time and place, and provides an opportunity to guide and develop an employee's skills and perceptions in the moment that the situation requires it. But you have to be precise, measured, and respectful. It cannot risk embarrassment in front of peers or customers. If the employee feels uncomfortable or even a little humiliated, the engagement and the mentoring is lost.

The other method is actually planned. The mentee comes prepared with a series of questions or problems that are not directly related to the actual work the mentee performs. It might relate to career planning or dealing with difficult customers. The length of time will depend on the mentee's preparation and how seriously you treat their concerns and questions. Remember that new employees need to feel safe in these situations.

### Has No Time?

#### Try Team Mentoring

Google's research on high-performing teams revealed that two things were consistently present in their meetings: broad participation and psychological safety. Calling on people — even if it feels like putting them on the spot — is critical for gaining broad participation. As long as the group is engaged in a topic that matters, and people are attentive when someone speaks, the safety will be there.

Similar to group "brainstorming," a team mentoring opportunity draws together a small group of employees, both seasoned and new, who can learn from one another without being competitive or feeling vulnerable to criticism. A team mentoring situation can address a general issue that might be shared among a number of employees or situations that seem to be associated with certain customers, vendors, or contractors.

## If you still aren't ready to build a mentoring program ...

... you will eventually have to **DO SOMETHING** to create change. To help get those idea rivers flowing, these are just some random (but provocative) suggestions you may want to consider.

### ENGAGEMENT

- If you want an employee to become more engaged and productive, have them sit next to and work with someone who is engaged and productive.
- After six months, ask a new employee if there is a specific talent he or she has that the organization is not using.
- Evaluate and eliminate every process or rule that *wastes time, generates useless data, or zaps enthusiasm*. Consider replacing them with one rule: *"Use your best judgment and act in the interest of your organization."*
- Every day, take a few minutes to walk around and just watch and listen how your employees behave and interact with each other and your customers.

### HIRING & RETAINING

- Use the free, customizable materials and programs available from NSCA's Ignite website, but customizable templates are at this link:  
<https://www.dropbox.com/sh/coao5cnzircwsd/AAAUUtylrks8RBgKiuJlgivka?dl=0>
- When you interview a prospect, ask this question – the answer will reveal quite a lot about that prospect: *"What is the biggest misperception that people have about you?"*
- Employees leave managers, not companies. Hire or promote managers who care for people. Place as much or more emphasis on social skills as on their AV technical skills.
- An engaged employee is more productive, profitable, and likely to stay ... but an *overworked*, engaged employee is more likely to leave.
- Recognize your employees' success, but privately address mistakes