


Literature Review

Mentoring: From Theory to Action

Profiled Institution	Industry	Employees	Revenues
Company A	Telecommunications	50,000 – 100,000	\$2 billion - \$5 billion
	Aerospace and Defense	More than 100,000	More than \$10 billion



Interviewed companies appear on Training Magazine's 2004 "Top 100" List

Recommended Readings :

Jane Cranwell-Ward, Patricia Bossons, and Sue Gover,
Mentoring: A Henley Review of Best Practice
—Palgrave Macmillan Publishers Ltd (August 2004).

Mike Frost, **The SHRM Mentoring Toolkit**
—Society for Human Resource Management
(compilation of current resources)

Key Questions:

What does current theory reveal about mentoring relationships?

How can companies use mentoring to drive business impact?

How do renowned training companies think about and implement mentoring programs?

Issue Overview: The Impact of Informal Relationship-Based Learning

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This literature review begins with an overview of mentoring theory and then explores mentoring's four-fold impact on the organization.

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Although organizations continue to spend significant amounts on formal training...

The American Society for Training and Development (ASTD) reveals an increase in both training expenditures as a percent of payroll and expenditures per trainee day among the Benchmarking Service Organizations (BSO) and Training Investment Leaders (TIL).¹

...Research suggests that informal relationship-based learning such as mentoring serves as the most consistently powerful source of individual and workforce performance.

- The Council's 2001 *Voice of the Leader* survey of over 8,000 leaders on their most impactful development experiences revealed that "feedback and relationship programs" outrank "experience-based" and "education-based" development programs.²
- Quantitative research from the Learning and Development Roundtable's 2002 study, *Emerging Mandates for the Learning and Development Function*, reveals that learning gleaned from informal sources—managers, peer networks, and work experiences—drives significantly greater improvements in performance than formal learning.³
- The Council's 2004 study *Driving Employee Performance and Retention Through Engagement* suggests conduits of informal learning, e.g., mentors, can have up to a 26 percent impact on discretionary effort.⁴

To that end, this research report synthesizes theory from literature and practices employed by renowned training companies in an effort to understand mentoring's impact on the business. After a review of current theory, the Council explores how companies use mentoring to increase knowledge transfer and retention, ensure a consistent learning culture, and foster a healthy supply of leadership talent.

EXECUTIVE SUMMARY

Mentoring is traditionally defined as developmental assistance offered to a junior employee by someone more senior and experienced in the organization. Although mentoring, in practice, may stray from this definition, its application and intention remains the same—provide a tangible benefit to the organization. In order to understand both theoretical and practical applications of this learning and development tool, this research provides an overview of current mentoring theory and supplements it with case examples gathered from published literature and interviews with two companies renowned for their training and development success.

Overview of Mentoring Theory

The Goals of Mentoring

Page 3

Organizations may choose to establish mentoring schemes to provide relationship-based support to employees; in particular, research suggests that women and ethnic minorities benefit particularly from these professional relationships. Overall, mentoring may fulfill the following functions:

- *Career-oriented mentoring* facilitates the career development of the protégé
- *Psychosocial mentoring* supports the protégé to encourage a sense of competence and effectiveness

Forms and Structures of Mentoring

Page 3-4

Mentoring in some form is practiced in almost every organization. Although it increasingly occurs as a product of a formal pairing program, it should not be defined exclusively in these terms. Mentoring may take the following forms:

- *Traditional (one-to-one) or Group Mentoring*
- *Informal or Formal Mentoring*
- *Reverse or Traditional "Downward" Mentoring*

Benefits of Mentoring

Page 4-5

Research reveals that mentoring programs may play a role in positively influencing organizational commitment, driving retention, and facilitating knowledge sharing across the organization.

Phases of the Mentoring Relationship

Page 5

Kathy Kram and Leonard Burgess, both noted mentoring researchers, developed a seasonal four-stage mentoring model which conceptualizes the mentoring relationship as it progresses through various stages of mutual utility.

Mentoring's Impact on the Organization

Share and Retain Knowledge

Page 6-8

Organizations may use mentoring to combat a leadership and skills gap. As a result of changing demographics and an increased technology mandate, organizations continue to use two-way mentoring ("older" and "younger" employees mentoring each other) to capture and share employee knowledge.

- *Mentoring programs to impart key job skills*—NASA and Lockheed Martin use group mentoring, "communities of communication," and mandatory executive mentoring to preserve the knowledge of their aging workforce.
- *Reverse-mentoring to impart knowledge to older workers*—Due to the increasing impact of the Internet and a management bench sometimes lacking technological skills, companies like Pearl Assurance foster corporate e-literacy with reverse mentoring programs.

Promote Diversity

Page 9

Many organizations laud the use of mentoring relationships as a way to communicate and foster the organization's commitment to diversity, while creating valuable relationships amongst employees. Company A's mentoring program provides affinity groups the opportunity to interact in a group setting, while JPMorgan's *Connections!* program encourages senior-level diversity sensitivity.

Create Continuity of Culture

Page 10-12

In an increasingly competitive business environment, companies with a clear sense of vision, values, and strategy have a distinct competitive advantage. In addition, Council research shows that employees' connection to organizational strategy positively impacts his/her level of discretionary effort. Mentors can be used to communicate a consistent message about the organization to those they mentor, which is particularly useful in dispersed corporate environments.

- *Creating a consistent culture through mentors*—Bell Canada uses an online mentoring program to embed a consistent culture across its dispersed organization.
- *Communicating organizational values to employees*—Lockheed Martin provides self-help mentoring resources for the entire employee population as well as K-12 outreach programs to illustrate its corporate commitment to learning.

Ensure Adequate Supply of Leadership Talent

Page 13-14

Research reveals that mentoring positively influences an organization's recruitment efforts and ability to create a deep leadership bench. Company A maintains mentoring programs for high potential employees in three of its leadership development programs to ensure that HIPOs understand development opportunities at the firm.

Overview of Mentoring Theory

The Goals of Mentoring

In an age where work has become increasingly depersonalized and where internal technologies within organizations frequently inhibit face-to-face communication, many organizations have established formal mentoring schemes to provide relationship-based support to their employees. In particular, organizations use formal mentoring programs to further the advancement of women and ethnic minorities, who would typically have limited access to informal opportunities for building mentoring relationships.⁵

Mentoring is generally regarded as a bi-functional process; it provides two forms of support or development to the protégé: career-oriented and psychosocial.^{6,7}

Career-Oriented	Psychosocial
<i>Facilitating the career development of the protégé</i>	<i>Supporting the protégé to encourage sense of competence & effectiveness</i>
<ul style="list-style-type: none"> ▪ Increases protégé's visibility to decision-makers' social networks and concomitant access to valuable information ▪ Provides challenging development assignments ▪ Suggests strategies for accomplishing work objectives 	<ul style="list-style-type: none"> ▪ Provides counseling, acceptance, and confirmation

Both the career-oriented and psychosocial functions of mentoring are important to the relationship, and both can positively influence the protégé's connection to the organization. This is evidence by a 1992 study by Terri Scandura of 244 manufacturing managers, which demonstrated that career-oriented mentoring is positively related to the rate of promotion and that psychosocial mentoring is positively related to salary level.⁸

Mentoring and Coaching Distinction

In general, mentoring tends to be 'person-focused' (centered on the rounded development of the individual) rather than role- or skill-focused, as in the case with coaching, for example.⁹

Forms and Structures of Mentoring

Mentoring in some form is practiced in almost every organization. Although it increasingly occurs as a product of a formal pairing program, it should not be defined exclusively in these terms.

Individual versus Group Mentoring

Author Stephen Appelbaum argues that while mentoring is a "voluntary pairing of two individuals for mutual personal and corporate gain" and "affects many aspects of organizational behaviour including leadership, organizational culture, job satisfaction, and performance," it is also "a multi-faceted and extremely diverse process." Mentoring in a corporate environment can be informal (spontaneous) or formal (structured), group (collective) or individual (one-to-one). Features of group and one-to-one mentoring are contrasted below.^{10,11,12,13}

One-to-One versus Group Mentoring		
Mentoring Type	Benefits	
Traditional (one-to-one) Mentoring	<ul style="list-style-type: none"> • Acts as explicit and exclusive point of reference for protégé in the company • Offers one-on-one interaction • Provides strong opportunity for mentor to explore and develop protégé's weaknesses and hone strengths 	<p style="text-align: center;">Mentor Roles</p> <ul style="list-style-type: none"> • <i>Advisor</i>—Recommends career direction for protégé, identifies possible career obstacles and assists protégé in overcoming them • <i>Ally</i>—Provides candid, forthright opinions • <i>Broker</i>—Assists protégé in establishing and increasing networking contacts • <i>Catalyst</i>—Promotes understanding of the corporate culture and clarifies employer expectations • <i>Communicator</i>—Facilitates discussion, interaction, and the exchange of information
Group Mentoring	<ul style="list-style-type: none"> • Mitigates personality conflicts between mentor and protégés • Facilitates networking by providing protégés with the opportunity to network among themselves • Provides same levels of mentoring and experience to all protégés • Reduces risk of protégé dependency on mentor • Reduces cost associated with mentoring (lost mentor productivity) 	

Overview of Mentoring Theory (continued)

Forms and Structures of Mentoring (continued)

Informal versus Formal Mentoring

Spontaneous or informal mentoring exists to some degree in all spheres of interaction between employees. Two similar individuals form a mutually supportive relationship, which is often based on a pre-existing relationship of trust and respect. The mentor-protégé aspect of the relationship originates in an unstructured way and is inherently characterized by compatibility and flexibility.¹⁴

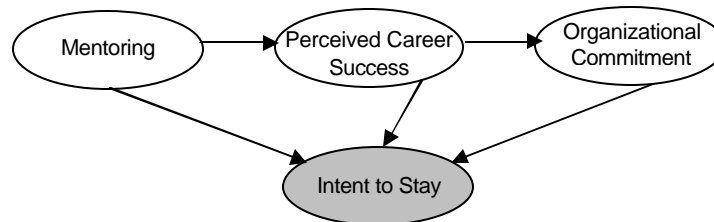
In some commercial organizations, where circumstance may not encourage the spontaneous formation of more personalized mentoring relationships, structured mentoring programs have been established in order to bring benefits to the organization that will equal or exceed those of any informal mentoring which occurs naturally. Most formal mentoring programs exhibit the following common characteristics:^{15,16}

- **Assigned pairings**—A number of senior managers are asked to act as mentors for particular subordinates.
- **High-potential pairings**—The protégés who are assigned mentors are carefully selected, on the basis of their likelihood of benefiting from the process, and their potential to contribute to the organization.
- **Regulated relationships**—Most often, mentors or the program coordinator decide how often mentor and protégé will meet; in some cases, mentors are required to meet with their mentees on a specified minimum number of occasions.
- **Evaluation**—Since mentoring is an activity designed to achieve particular aims, the organization will typically make an effort to assess the effectiveness of the program and compare its cost and benefits.

Benefits of Mentoring

Positively Influencing Perceptions of Career Success—Organizational commitment is generally defined as “the strength of an individual’s identification with or involvement in a particular organization.” Consequently, research suggests that a successful mentoring program may be an important factor in positively influencing protégés’ perceptions of career success and organizational commitment, which in turn is likely to reduce their turnover intentions, as seen in the figure below:^{17,18,19,20}

Figure 1: Effects of Formal Mentoring in the Workplace



Source: Therese A Joiner, Timothy Bartram, and Teresa Garreffa, *Journal of American Academy of Business* (2004)

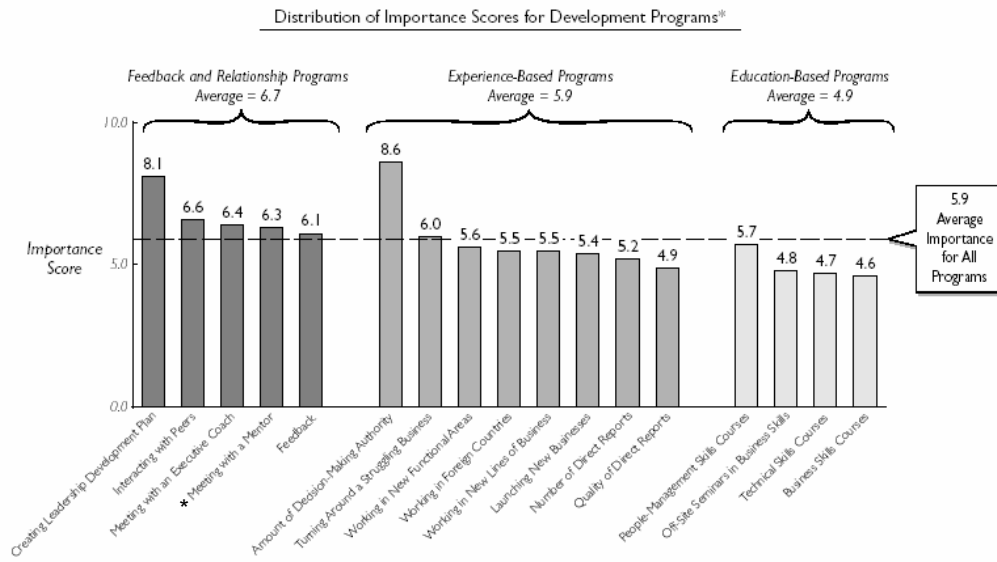
Driving Retention Through Informal Learning—The Corporate Leadership Council’s study *The Compelling Offer*, originally published in 1999, analyzed the career preferences of high-performing employees on 26 different employment offer attributes in an effort to understand the changing employee value proposition. With a database today containing over 225,000 employee responses, research reveals that changes in “development and work environment” activities (as opposed to “compensation and benefits,” “work-life balance,” and “company environment”) have the most profound ability to increase employee satisfaction.²¹

Overview of Mentoring Theory (continued)

Benefits of Mentoring (continued)

Sharing Knowledge with Other Leaders—The Council's 2001 study, *Voice of the Leader*, presenting the results of a survey of over 8,000 leaders, reported that “feedback and relationship strategies” are the most significant category of development to leaders. Ranked fifth out of 17 different development activities, “meeting with a mentor” provides an opportunity for employees to gain knowledge from more experienced colleagues.²²

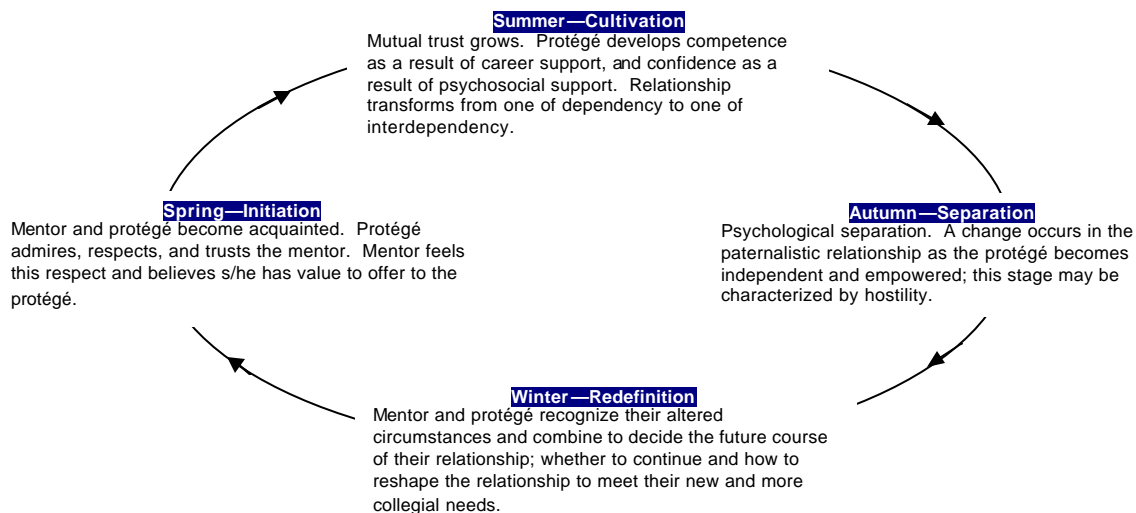
Figure 2: Importance of Employee Networking and Learning to Leaders



Phases of the Mentoring Relationship

One of the most prominent writers on mentoring relationships and their effects is Kathy Kram, Professor of Organizational Behavior at Boston University. In 1983, Kram presented a paper based on 15,000 qualitative interviews with both mentors and protégés at a U.S. public utility company, which documented four phases in mentoring relationships: Initiation, Cultivation, Separation, and Redefinition. Kram's four-stage model has been adapted by Leonard Burgess and presented as a 'seasonal' model, as depicted below. The model conceptualizes the mentoring relationship as progressing through various stages of mutual utility.^{23,24}

Figure 3: Burgess' 'Seasonal' Four-Stage Mentoring Model



Source: Leonard Burgess, *Mentoring Without the Blindfold* (1994).

Share and Retain Knowledge	Promote Diversity	Create Continuity of Culture	Ensure Adequate Supply of Leadership Talent
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Addressing the Looming Leadership and Skills Gap through Mentoring

“Mentoring ... is no longer just a courtesy offered by nurturing executives to a few promising up-and-comers. It’s a crucial strategy for transferring wisdom and growing talent in every department of the company and provides a solid foundation for advancing future business growth.”²⁵

—Chairman, Accountemps

Transferring Potential “Lost” Knowledge as a Result of Retirement or Skill Gaps

The Corporate Leadership Council’s Aging Workforce Teleconference

The Council hosted a teleconference on the aging workforce in 2004. Panelists included representatives from Pacific Gas and Electric (PG&E) and the Salt River Project (SRP). Further details are available on the Council’s Web site.

—www.corporateleadershipcouncil.com

Changing Demographics Create Need for Mentoring Programs—In recent years, mentoring has continued to take on heightened importance due to the looming leadership gap that will likely result from the retirement of baby boomers and the rapid pace of technological and culture change in today’s workforce.²⁶ In fact, in the next five years, both the public and private sectors will see a sizeable shift in workforce demographics.^{27,28,29}

Critical Retiring Workforce Statistics

Aging Workforce

In 2005, the number of North American workers age 55 to 64 will increase 43 percent while the overall workforce will grow by one-tenth of one percent. By 2010, the median age of the workforce is projected to be 40.

Private Sector:

✓ According to the *Bureau of Labor Statistics*, more than 34 percent of workers in the private sector are 45 years old and older.

Public Sector:

✓ The average age among federal government employees is 44, and more than one-third of the employees are over 50 years old.

✓ Over 7.5 percent of the federal work force is under age 30, while 38 percent is over 50.

Leadership Ranks

- At some organizations, 40 to 75 percent of eligible retirees are in senior management positions.
- Approximately 20 percent of *Fortune* 500 senior executives are currently eligible for retirement.

Organizations may use mentoring partnerships to encourage senior employees to reach out to younger employees and in the process impart critical job skills and knowledge to them. While some organizations have a formal mandatory program, others maintain informal “buddy-type” relationships. In such programs, the older workers play an instructional role in addition to their regular job responsibilities.³⁰

Share and Retain Knowledge	Promote Diversity	Create Continuity of Culture	Ensure Adequate Supply of Leadership Talent
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Mentoring to Preserve Retirees' Knowledge and Upskill Workforce

Recognizing that mentoring programs provide a relatively inexpensive vehicle for organizations to share and retain knowledge, companies are using both older and younger mentors to impart skills to their counterparts. Facing significant skill gaps as a result of impending retirement, both NASA and Lockheed Martin employ mentoring programs individually and collectively, as seen in figures two and three below.^{31,32}

Mentoring Future Leaders at Salt River Project³³

Salt River Project (SRP) pairs older and younger workers in a self-initiated mentoring relationship. To ensure all pairs provide similar opportunities for development, SRP requires that mentors and mentees attend training prior to the start of the program.

—www.corporateleadershipcouncil.com

Mini Tactic 1: Mentoring Programs to Impart Key Job Skills

The following two practices illustrate how public agencies use mentoring to combat a potential large-scale knowledge loss.

Group Mentoring and “Communities of Communication” at NASA



Group mentoring allows for the transfer of knowledge to more than one individual. NASA developed several such programs as part of its knowledge sharing initiative. These programs allow agency employees and experienced individuals to share knowledge as described below:

- **Forum of Master Project Managers**—Held off-site, twice a year, veterans and highly successful project managers share stories about their experiences regarding their participation in high-profile NASA projects.
- **Transfer Wisdom Workshops**—Group mentoring is accomplished through one-day workshops held at individual agency centers and are based on small group discussions of case studies, where the participants analyze the applicability of the challenges highlighted in the case studies to their own centers.

Individual Mentoring Programs at Profiled Government Agency

HR at another government agency sets up a mentoring relationship prior to the planned departure of a retiree to capture his/her knowledge before leaving the agency. Three to four trainees work with the retiree prior to his/her departure to learn the job, tactics, and cultural information that one cannot learn from a document or other learning initiative.

Similar to the public sector initiatives mentioned above, Lockheed Martin recognized that it needed to preserve the knowledge of its aging workforce. As such, the company created a mandatory mentoring program for its top 2,000 executives, half of whom must be women or minorities.

Case Profile 1: Mandatory Executive Mentoring Program at Lockheed Martin



Key Distinguishing Features:

- ✓ Participation in the mentoring program is required for all executives
- ✓ Half of the protégés must be women or minorities
- ✓ Mentoring relationship lasts two years

Situation: With roughly one million employees in the aerospace industry downsized over the last 10 years and baby boomers nearing retirement, Lockheed Martin realized it needed a method to transfer job knowledge to high potentials in the company.

Action: Lockheed Martin's mentoring steering committee (which consists of representatives from each business unit) received approval from the Chairman and COO to require mentoring for the top 2,000 executives in the company. The program consists of the following elements:

- Each business unit receives information on who is eligible for pairing through succession planning
- Local HR in the business units provides general information on mentoring to pairs; the process is left largely open to accommodate personal match preferences

Result: Lockheed Martin conducted an anonymous survey at the one-year mark of the mentoring program and received a 78 percent satisfaction rate, with over 50 percent of surveyed participants responding.

Share and Retain Knowledge	Promote Diversity	Create Continuity of Culture	Ensure Adequate Supply of Leadership Talent
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Mentoring to Preserve Retirees' Knowledge and Upskill Workforce (continued)

Reverse-Mentoring: Using Younger Employees to Impart Knowledge to Older Workers

—Due to the increasing impact of the Internet and a management bench sometimes lacking technological skills, companies such as Procter & Gamble, GE Industrial Systems, and Pearl Assurance, the UK subsidiary of Australia-based AMP Limited, use reverse mentoring programs to educate their leaders and employees about Internet technologies and conduct basic research online.^{34,35,36} Outlined below is Pearl Assurance's reverse mentoring program:

Increased Technology Mandate Creates Need for Reverse-Mentoring³⁶

Research indicates that reverse mentoring (when a younger employee mentors an older employee) may help address skill gaps, particularly technological skills. Since the mid-1990s, consumer Internet access has increased rapidly, causing organizations to provide training that enables its employees to respond effectively to the 'Net generation.'

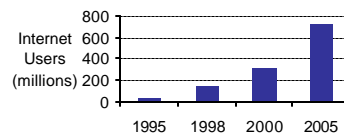
Mini Tactic 2. Fostering Corporate E-Literacy with Reverse Mentoring



Pearl Assurance

Industry: Financial Services
Employee Size: 2,700
Revenues: \$1.2 Billion

Challenge: Upskilling Senior Managers on Internet Technologies



Responding to a dramatic increase in the impact of the Internet on consumer choice (as illustrated in the chart on the left), Pearl Assurance recognized a pressing business need to educate its executives about Internet technologies so that it could capitalize on the emerging commercial opportunities that the Internet provides for financial services firms.

Solution: Reverse Mentoring

Pearl capitalized on the latent expertise of its technology savvy junior employees by assigning young "mentors" to senior staff in order to educate them about the Internet. In semi-monthly meetings, the pairs conducted the following activities:

- Surfing the Internet to locate interesting sites and functionalities
- Discussing potential e-business ideas, or those already in development

Result: Improved Leverage of E-Commerce

These relationships provided insight into possible improvements in the following areas:

Consumer Insight	<ul style="list-style-type: none"> • Senior managers report that contact with the mentors "opened their eyes" to the way the younger generation thinks about the Internet.
Process Insight	<ul style="list-style-type: none"> • Collectively, the mentors serve as a testing ground for new product and process ideas. The group suggested and designed an employee "cyber café."
Cultural Insight	<ul style="list-style-type: none"> • Managers report that the program has become a "joint venture" and adds "additional cultural value by reinforcing cross-company relationships."

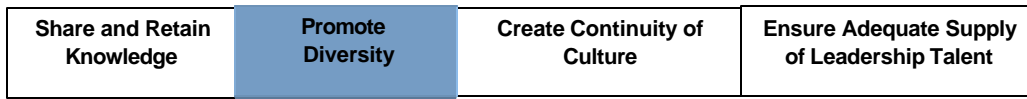
In addition, companies may want to use reverse mentoring so that senior executives can relate to younger clients and gain cutting-edge business knowledge as seen in the examples below:³⁷

- **Relating to Younger Clients**—Advertising agency RSCG Life's reverse mentoring program allowed more than 30 senior executives to learn about technology and pop culture so they can relate to younger clients and boost their own computer skills.
- **Learning Cutting-Edge Business Skills**—The University of Pennsylvania's Wharton Fellows Business program matches 60 executives with MBA candidates and undergraduates who have demonstrated an outstanding grasp of technology. The students help the executives gain knowledge in technology and business through reverse mentoring.

Prevalence of Reverse Mentoring in Surveyed Companies

The Center for Coaching and Mentoring found in 2001 that 21 percent of respondents use reverse mentoring to spread technical expertise and 26 percent use it to help executives gain a "young" perspective.

—Jeff Barbian, *The Road Best Traveled* (May 2002).



Embracing Diversity through Mentoring

Many organizations laud the use of mentoring relationships as a way of demonstrating commitment to and support of diverse employees. The data below demonstrates mentoring's impact on diverse employees:³⁸

- **Crucial to Females' Career Development**—Research conducted by Catalyst shows that 81 percent of female executives believe mentoring relationships were crucial to their career development.
- **Effect on Female Promotion Rates**—A recent study by Ohio State University found that women who were being mentored were 60 times more likely to be promoted than those who were not.


Company A developed a pilot mentoring program in one of its key business units for diverse employees to become future leaders. The program also allows geographically dispersed minority employees the opportunity to build relationships with other minorities and mentors.

<p>Company A</p> <p>Key Distinguishing Features:</p> <ul style="list-style-type: none"> ✓ Geographically dispersed minority employees have the opportunity to build relationships with their mentor and fellow protégés. 	<p>Case Profile 2: Group Mentoring Through Affinity Groups at Company A</p>
	<p>Situation: With current mentoring programs only including high potentials in early career development programs, Company A wanted to ensure that minority employees not involved in these programs still received career contacts and guidance.</p> <p>Action: Company A is piloting a mentoring program that targets the affinity groups within one key business unit. The president of the division solicited executive-level mentor volunteers to provide career guidance. Each mentor then delivers career advice to groups limited to eight people on topics self-selected by the affinity group.</p> <p>Result: Company A plans to gather results through a participant survey six months into the program.</p>

JPMorgan Chase developed *Connections!*, a diversity reverse mentoring program in which junior-level employees of diverse backgrounds mentor the firm's top executives, as described in the case example below:³⁹

Mini Tactic 3: Diversity Reverse Mentoring at JPMorgan Chase

<p>Group Mentoring for Women at Chubb⁴⁰</p>
<p>Chubb decided to create group mentoring circles for women on topics of wide interests. The meetings occur once a month and are held at conference tables or during lunch. Topics including the following:</p> <ul style="list-style-type: none"> • Networking • Work/life balance • Self-branding • Creating career plans

 <p>JPMorgan Chase</p>	Industry: Financial Services
	Employee Size: 94,300
	Revenues: \$43.4 billion

Challenge: Skepticism about Senior Executives' Sensitivity to a Diverse Workforce

Because there are relatively few minorities in JPMorgan Chase's senior vice president population, employees were skeptical of the executives' ability to understand the perspectives and challenges of individuals from different cultural or ethnic backgrounds.

Solution: Creation of *Connections!*, a diversity reverse mentoring program

JPMorgan Chase created *Connections!*, a program that consists of a series of one-on-one conversations designed to spark discussions about diversity issues between mentors (young diverse employees) and their protégés (senior executives). Mentoring pairs are expected to meet for one hour at least six times over a one-year period. The company provides structural and technological support mechanisms for the pairs, such as the following:

- **Organizational support** from *Connections!* team members and HR generalists
- **Electronic forum** a Web tool that assists with team collaboration
- **Mid-program checkpoint** conducted to assess the mentors' accomplishments or challenges



Communicate Culture Across the Organization

“Trying to get one group, HR, to drive such a vast initiative [as mentoring] is not going to work. We need to get the whole organization involved to drive this forward. I call it a culture of mentoring across Lockheed Martin.”

—Human Resources Vice President, Lockheed Martin

Companies view mentoring as a way to create a consistent culture across a dispersed workforce, allow new employees to learn company norms, celebrate diversity, and communicate the company’s values to employees.

Capitalizing on Mentoring’s Role in Creating a Culture that Drives Engagement

In an increasingly competitive business environment, companies with a “clear sense of vision, values, and strategy” have a distinct competitive advantage.⁴¹ Mr. Robert Haas, chairman and CEO of Levi Strauss, espouses the belief that “a company’s culture—what it stands for, what its people believe in—is crucial to its competitive success.”⁴²

Specifically, findings from the Corporate Leadership Council’s 2004 *Driving Performance through Employee Engagement* reveal that certain organizational culture traits have a positive effect on employees’ discretionary effort levels and intent to stay.⁴³ In fact, 6 of the top 50 drivers of engagement surveyed relate to culture, as seen in the figure below.

Figure 4: Impact of Organizational Culture as a Driver of Engagement

Cultural Traits	Impact on Discretionary Effort
Internal Communication	29.2
Reputation of Integrity	27.6
Innovation	26.0
Flexibility	24.7
Customer Focus	23.2
Future Orientation	23.1

Mentoring on a Global Scale

“Global mentoring is ‘more work. You have to plan ahead. You have to listen hard. But it works; sometimes it works better because you have to prepare’ more for these indirect meetings.”

—Linda Phillips-Jones, author of *The New Mentors and Proteges*, 2001

One of the ways in which mentoring promotes a strong organizational culture is that mentors can communicate a consistent message about the organization to those they mentor. Consistency of communication is particularly useful in dispersed corporate environments.⁴⁴ Global mentors, for example, are gaining in popularity as organizations move toward seamless business interactions across the globe. These relationships may prove an invaluable resource to individuals while providing the following benefits to organizations:⁴⁵

- Offering a global perspective on business issues
- Preparing a mentee for a trip or assignment abroad
- Sharing company knowledge on a global scale



Create a Culture that Communicates Organizational Ideals

Creating a Consistent Culture Through Mentors

With an employee population spread across four regions and distinct product lines, providing a consistent culture around development is of paramount importance to Bell Canada's senior leadership team, as seen in the figure below.⁴⁶

Mini Tactic 4: Utilizing Mentoring to Create a Consistent Organizational Culture



Bell Canada

Industry: Telecommunications
Employee Size: 40,000
Revenues: CDN\$14.3 billion

Challenge: Lack of a consistent corporate culture in a dispersed organization

With an employee population spread across four regions and multiple product lines, Bell Canada faced difficulty in growing leaders with knowledge and networks across the organization. Bell Canada's leadership recognized that cross-functional mentoring relationships could help cement the organizational culture and build the next generation of leaders. However, existing mentoring programs relied on manual matching systems that would become prohibitively expensive if applied to the entire organization.

Solution: Online Mentoring

As a result, HR leadership set out to create an online mentoring program that would fulfill the following criteria:

Self-Service <input checked="" type="checkbox"/>	Organization Wide <input checked="" type="checkbox"/>	Fully Automated <input checked="" type="checkbox"/>
<ul style="list-style-type: none"> ➤ Online profiles and relationship matching reduces cost and administrative burden ➤ Ensures accessibility for all eligible employees 	<ul style="list-style-type: none"> ➤ Fosters information sharing between groups to break down organizational and cultural silos ➤ Expands number of potential relationships 	<ul style="list-style-type: none"> ➤ Facilitates tracking of participation and success statistics ➤ Online mentor training eliminates need for HR consultants

Using Mentoring to Teach New Employees about Company Culture

As researchers Roethlisberger and Dickson showed in 1939, group norms shape employees' behavior more powerfully than monetary rewards and physical work environments. As such, organizations must focus on effectively onboarding and clarifying cultural values at the onset of an employee's career.⁴⁷

Norfolk Southern found that placing new hire HIPOs into mentoring programs accelerated their acclimation and development as they quickly learned the success factors inherent to the organization's culture—much more quickly, in fact, than other employees.⁴⁸



Create a Culture that Communicates Organizational Ideals (continued)

Communicating Organizational Value to Employees

An important aspect of values implementation across an organization is developing an effective communication system such that values are transformed from mere statements to a way of corporate life.

The transformation of values into tangible and practical behaviors hinges on efficient and effective dissemination of practices that reinforce these ideals. Lockheed Martin uses two types of mentoring programs to communicate what the company values to its employees. The program described at left in the box below illustrates a cultural change from training to "learning through others," while the tactic shown in the right-hand side of the box illustrates how Lockheed Martin promotes the value of mentoring beyond the organization.

Case Profile 3: Communicating Lockheed Martin's Values Through Mentoring Programs



Providing Self-Help Mentoring Resources for the General Employee Population

Challenge—When Lockheed Martin radically altered its talent development philosophy, it realized the importance of communicating this change to its employees. Lockheed Martin saw talent development moving away from short training exercises or managed job assignments to a career-long dedication to development. The company wanted its employees to view talent development as "learning through others."

Action—Lockheed Martin created a self-driven mentoring resource for the general employee population to reinforce its commitment to informal learning through mentors. The company created a mentoring Web site and marketed the resources through the company intranet and marketing materials at all locations. With over 1,000 participants, protégés and mentors may access the following resources through the mentoring Web site:

- Information on annual orientation programs
- Self-initiated pairing philosophies
- Training materials

In addition to the intranet and posters advertising mentoring, Lockheed Martin also hosts annual mentoring forums to fully explain to a select group of employees the resources available to them. The mentoring committee brings in 100 points of contact (HR representatives) from across the company to explain the tools on the Web site and overall expectations for mentoring, which they then share with the entire employee population. (Please see the appendix on page 13 for additional information).

Using K-12 Outreach to Strengthen Corporate Culture



Challenge—To demonstrate to its employees that mentoring is a skill that can be used outside the workplace, Lockheed Martin reserves approximately 60 percent of its philanthropic budget for school-related mentoring programs.

Action—Lockheed Martin builds relationships with students through the following science and math program:

- Lockheed Martin mandates that business units partner with elementary and secondary schools to promote science and technology education.
- Business units have the latitude to implement programs that are appropriate for their circumstances.
- Lockheed Martin employees may visit classrooms to teach math or science lessons, provide training to teachers on how to teach science in a way that is fun, or host science programs at company sites.

An Array of Mentoring Experiences

"Mentoring is not at a certain employee level, or a single initiative, but, rather, a whole array of experiences. If someone has a 25-30 year career here, we'd like to see different types of mentoring experiences as they move throughout their career."

—Director of HR, Lockheed Martin

Share and Retain Knowledge	Promote Diversity	Create Continuity of Culture	Ensure Adequate Supply of Leadership Talent
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Mentoring Positively Affects Recruitment Efforts and Builds a Strong Leadership Bench

"Mentoring is critically important ... so that our young leaders are prepared to address the significant issues facing our field today and tomorrow."⁴⁹

—CHE Vice President, Support Services Strategic Initiatives,
Saint Vincent Catholic Medical Centers, New York

Research reveals that mentoring positively influences an organization's recruitment efforts and ability to create a deep leadership bench. Recruits into an organization value mentoring as a demonstration of the organization's commitment to employee development, while current employees see mentoring as a way to network and learn from colleagues.

Mentoring as Recruitment Tool

Literature suggests that organizations can reap rewards by positioning mentoring as a demonstration of the organization's commitment to employee development during the recruitment process. In fact, research reveals that mentoring is a valuable element of the employment proposition.^{50,51,52}

- **Mentoring as a Desired Corporate Benefit**—Over 60 percent of surveyed college and graduate students list mentoring as a company requirement when selecting an employer after graduation.
- **Commitment to Development and a Positive Work Environment**—In its ongoing surveys of the career preferences of high performing employees, CLC Solutions found that the second most important category of attraction and retention drivers for employees relates to a positive development and work environment. The most important category to high-value employees includes compensation and benefits drivers.

Mentoring to Build Bench Strength

CEOs of the largest and most complex global organizations are increasing their focus on cultivating talent across the firm.⁵³ This emphasis on talent—including the leadership bench—is driven both by the need to manage through current economic turbulence as well as the challenges of promoting long-term corporate growth. Importantly, the largest constraint to growth has traditionally been the capabilities of the firm's human capital and the leadership bench in particular.

Increased Use of Coaching and Mentoring to Train Leaders⁵³

A 2003 IOMA survey of HR professionals shows that companies are increasing their use of coaching and mentoring as a means of training leaders and controlling training and development costs. The survey revealed the following:

- Twenty-eight percent of small companies (<400 employees) and 10.3 percent of mid-sized companies (400 – 1,000 employees) use mentoring to cut costs.

Share and Retain Knowledge	Promote Diversity	Create Continuity of Culture	Ensure Adequate Supply of Leadership Talent
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Action: Organizations Use Mentoring to Recruit New Hires and Develop High Potentials

Literature reveals that companies use mentoring programs in their recruitment efforts and as tool for developing high potential new hires, as seen in the following examples below:

- **Promoting a Corporate Mentoring Program in Campus Recruiting**—Union Pacific found that college recruits were highly impressed with the company’s new employee mentoring program. As a result, the organization found it gained a recruiting boost by promoting the merits of the program on college campuses. The program also serves as a retention tool, which minimizes re-recruiting costs.⁵⁴
- **Providing Relationship-Based Development Opportunities for HIPOs**—RBC Financial Group (RBC) realized that generic leadership development programs were not providing the kinds of targeted, high-return experiences that its leaders needed for accelerated development. As such, RBC supported targeted, experience-based development with relationship-based activities such as coaching and leader-to-leader training.⁵⁵
- **Focusing on Top Talent**—The director of education, training, and development, at Ford Motor Company has mentored for 20 years. Eighty percent of his 18 mentees have been promoted to his level or directorship level. He believes that it is important to focus on top talent and that mentoring should be a reciprocal process where mentors also learn from the relationship.⁵⁶

Company A maintains mentoring programs for high potential employees in three of its leadership development programs. The comprehensive mentoring program ensures that HIPOs, early in their career, realize the development opportunities available to them.

Case Profile 4: High Potential Mentoring Process to Ensure Leadership Bench

Company A

Key Distinguishing Features:

- ✓ Mentoring relationships are mentee-led, with protégés outlining expectations and goals from the beginning
- ✓ Kick-off meeting includes ice breaker events and outlining of mentoring expectations

“Mentoring at [Company A] has been in existence [for] a number of years ... I think literature and research shows that people do, in fact, learn from relationships. We understand that mentoring is a part of great leadership training.”

—Manager, Leadership Development Activities, Company A

Company A’s mentoring programs target employees participating in leadership development programs and identified as high potentials through the company’s succession planning process. The three learning and development programs include the following:

- **Leadership Development Program**—Approximately 375 participants with 85 percent choosing a mentor
- **Staff Associate Program**—65 to 70 participants with approximately 75 percent assigned a mentor
- **Finance Development Program**—65 to 70 participants with approximately 100 percent choosing a mentor

The mentoring program features the following elements:

- Mentor-mentee matching where guidelines suggest that mentees should be paired with someone at least two levels above them
- Pre-work document that each mentee completes prior to start of the relationship, and includes the following elements: self -assessments, 360 reviews, and personality assessments to determine what leadership skills they would like to develop
- “Ice breaker” meeting led by executive coaches that includes a dialogue about the pre-work document and a formal agreement about relationship expectations
- One-year mentoring relationships, with bi-annual relationship check-ups by Human Resources employees

Appendix: Lockheed Martin's Mentoring Developmental Roadmap

Lockheed Martin uses its Mentoring Development Roadmap as a guide for HR professionals and business unit leaders to gauge employee acceptance of the general mentoring program. HR professionals use this roadmap (revealed to them by the mentoring steering committee in an annual forum) to map where their business unit falls in the mentoring program lifecycle.

Mentoring Development Roadmap

Foundational	Enlightened	Embraced	Integrated	Institutionalized Inclusion (Composite World Class)
<ul style="list-style-type: none"> ▪ Mentoring happens informally and sporadically ▪ Mentoring is not aligned with program such as talent management, diversity, or employee development programs ▪ No local mentoring support available to employees; employees have access to mentoring only through the Learning Management System ▪ Some application of mentoring on an informal basis ▪ Training in mentoring not available to managers or employees ▪ Little participation of senior management or HR in mentoring ▪ Company may participate in Educational Outreach Mentoring, but not linked to diversity objectives 	<ul style="list-style-type: none"> ▪ Promotion and awareness of the value of mentoring increases participation in mentoring relationships ▪ Some evidence of mentoring programs that focus on diversity ▪ A local mentoring strategy exists utilizing Lockheed Martin programs, but is not widely utilized ▪ Limited application of mentoring; largely on an informal basis ▪ Not aligned with talent management or other employee development programs ▪ Some senior leadership participation ▪ A few managers are advocates of mentoring ▪ Training in mentoring not widely available to managers and employees ▪ Some HR support of mentoring Recognize relationship between mentoring and diversity performance 	<ul style="list-style-type: none"> ▪ Formal mentoring is implemented and effectively links to the Business, Talent Development, and Diversity Strategies ▪ Mentoring programs are available and supported at all levels of the organization ▪ Formal mentoring relationships exist in accordance with Lockheed Martin programs: ▪ Executive Mentoring ▪ Employee Mentoring ▪ Educational Outreach Mentoring ▪ Participates in Corporate Developmental Programs (LDP, LM 21 SME, EAD, etc.) leveraging mentoring ▪ Managers serving as mentors are trained in mentoring ▪ All employees are aware of the mentoring initiative ▪ Training in mentoring is available to all employees ▪ Senior leadership and HR involvement 	<ul style="list-style-type: none"> ▪ Formal mentoring is widely supported and rewarded as a means to develop talent in support of business strategy ▪ A Formal Mentoring program is successfully supported resulting in improved career development, knowledge transfer, and increased retention ▪ Formal mentoring relationships extensively utilized at all levels throughout the organization in accordance with Lockheed Martin programs: ▪ Executive Mentoring ▪ Employee Mentoring ▪ Educational Outreach Mentoring ▪ Participates in Corporate Developmental Programs (LDP, LM 21 SME, EAD, etc.) leveraging mentoring ▪ Mentoring tightly aligned with talent development and succession planning ▪ All employees and managers understand the developmental value of mentoring ▪ All managers are knowledgeable and skilled in mentoring ▪ Training in mentoring is available to all managers and employees ▪ Special mentoring programs are linked to diversity objectives ▪ Mentoring participation encouraged and supported by senior leadership ▪ Active HR involvement ▪ Internally and externally recognized for mentoring ▪ The organization sponsors a K-12 mentoring program 	<ul style="list-style-type: none"> ▪ A culture of formal and informal mentoring is embedded throughout the organization ▪ Employees are empowered and expected to participate and utilize mentoring to assist in career development consistent with business goals ▪ Formal mentoring relationships extensively utilized at all levels throughout the organization in accordance with Lockheed Martin programs: ▪ Executive Mentoring ▪ Employee Mentoring ▪ Educational Outreach Mentoring ▪ Participates in Corporate Developmental Programs (LDP, LM 21 SME, EAD, etc.) leveraging mentoring ▪ Mentoring is tightly linked with business, talent management, diversity, and employee development strategies and systems ▪ Mentoring is culturally embedded in the organization; employees and managers value the developmental benefits of mentoring ▪ Most employees and managers are serving as a mentor or mentee ▪ Managers are highly knowledgeable and skilled in mentoring; mentoring is recognized as an integral part of their jobs ▪ Demonstrated ability to mentor is among criteria for selection of new supervisors/managers ▪ Training in mentoring is available to all mentoring participants ▪ All employees are aware of the mentoring initiative ▪ Special mentoring initiatives exist which are tightly linked to diversity objectives ▪ The best mentors are positively recognized (tangible, intangible, career advancement) ▪ Highly visible leadership support ▪ Mentoring is a significant HR competency – HR professionals have a deep understanding of the dynamics of mentoring relationships (i.e. cross race, cross gender as well as across hierarchical and professional boundaries). ▪ Feedback/Metrics available to evaluate linkage to business, talent development, diversity, and knowledge transfer strategies ▪ Strong drive for continuous improvement and deep learning, both at the individual participant and organizational level ▪ Widespread recognition, internally and externally, as the leader in mentoring ▪ The organization sponsors a K-12 mentoring program and links such programs with its recruitment, talent development, and diversity strategies

THE RESEARCH PROCESS IN BRIEF

Research Methodology

The Corporate Leadership Council conducted a comprehensive search of published materials regarding mentoring programs, drawn from previous Corporate Executive Board research, trade press journals, other research organizations, and the Internet. Council staff then interviewed human resources professionals at two companies on *Training's* 2004 Top 100 list. These individuals discussed their mentoring programs. This report represents the findings from these secondary and primary sources.

Project Aims

Theory

1. What are the objectives/goals/focus of your company's mentoring program(s)?
2. How long have you had a mentoring program in place? Has the program gone through iterations since its inception? Why?
3. What function does the mentoring program serve in your organization?

Action

4. Could you please give a general overview of the mentoring program that you provide (*i.e.*, formal or informal, traditional one-on-one or by group, employee level)?
 - a) Which employees participate in the mentoring program (who receives mentoring, who mentors)?
 - b) Do you facilitate targeted mentoring programs for certain employee groups (HIPO, executive/leaders, certain positions like new hire sales people, diverse groups, reverse mentoring)?
5. How long does the mentoring program typically last? Do employees graduate or is there some other type of closure (*i.e.*, meetings, closing events, parties)?
6. How are mentors selected? Could you please describe the mentor-mentee matching process at your organization?
7. What roles do mentors fill? Do the roles vary? If the roles vary, does the company customize the role?
8. What are the expectations of the mentors and mentees? How much time does the program typically require of the mentor/mentee?
9. How does the company prepare mentors and mentees for their roles? What kind of training does the company provide mentors to prepare them?
 - a) If there is a problem in the mentoring relationship (*e.g.*, personality clash, dependency and suffocation within the relationship, destructive relationship characterized by jealousy), what assistance, if any, do you provide to the participants?
10. Does your company prepare managers to having their employees mentored? How does your company involve them so that they are a stakeholder in the process?
11. How do you evaluate the return on investment for your program? How do you evaluate/assess the success of the program?
12. In your opinion, why/how has your mentoring program(s) been a success at your company? What does your organization do well and what could be improved upon?

PROCESS IN BRIEF

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Professional Services Note

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