



Mentorship Program Kickoff

New to In-house Affinity Group

January 1, 2026

Agenda

1. Defining Mentoring
2. Phases of the Mentorship Program
3. Mentoring Foundations
 - a. Social Identity Map
 - b. Current State Evaluation
 - c. Define Goals
 - d. Establish Action Plan

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Defining Mentoring

Difference Between Sponsorship, Mentorship & Coaching



MENTOR

Someone who formally or informally helps a Mentee navigate his/her career and provides guidance on career choices and decisions.

SPONSOR

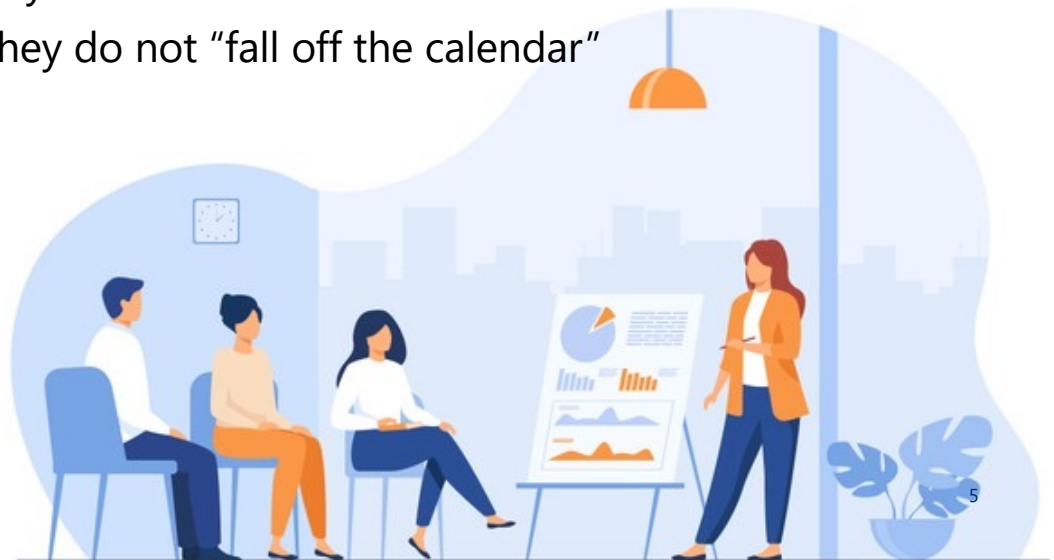
Someone who uses his/her influence to help an individual obtain high-visibility assignments, promotions, or jobs.

COACH

Someone who provides guidance for another's development, often focused on soft skills (e.g., active listening) rather than technical skills (e.g., financial acumen).

Pillars of a Successful Mentee

- Take time to think through your goals and aspirations
 - Setting realistic skill-driven goals
 - Focus on discreet targeted areas rather than trying to boil the ocean
 - Ensure goals are realistic for timeframe
- Be open and entering relationship unguarded
 - Listen, understand and absorb feedback, whether positive or constructive
- Drive your development and avoid “it’s-good-for-you” goals
- Manage time with your mentor wisely
 - Schedule check-ins ahead so they do not “fall off the calendar”
- Stay positive and engaged



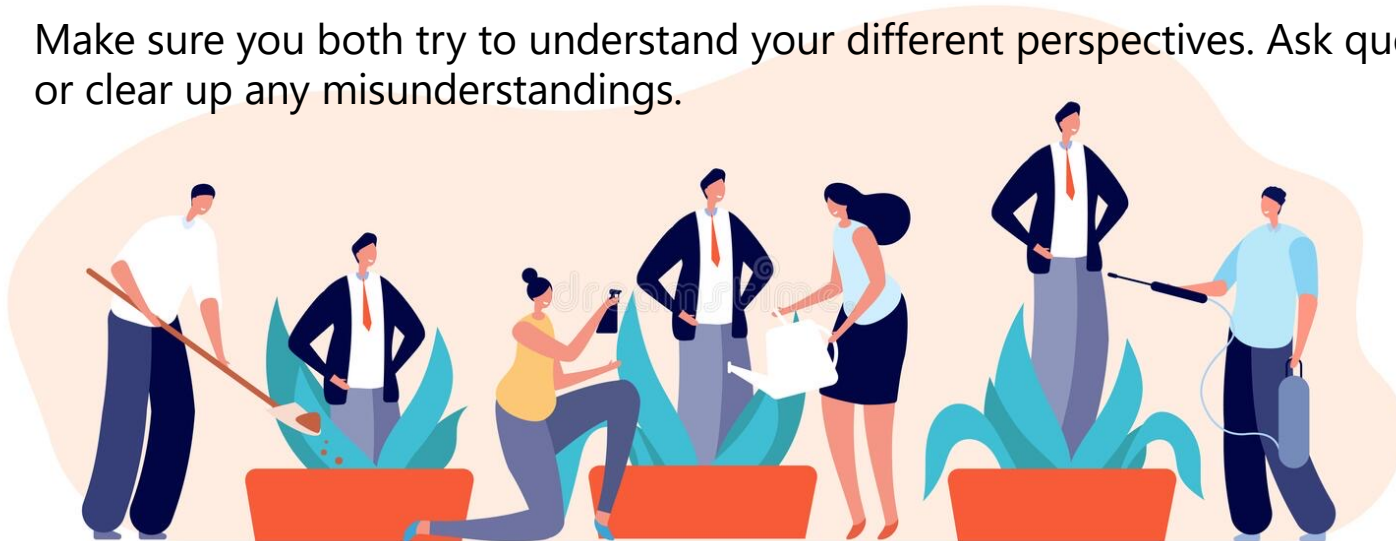
Being a Successful Mentor

- Make time for your mentee
- Set a foundation of trust and maintain confidentiality
- Listen intently
 - understand the goals and aspirations of your mentee to be able to provide the best guidance, advice and feedback
 - Do not make any assumptions about your mentee, rather, ask open-ended questions to gather insight
- Explain your role as a learning facilitator
- Make it personal and share your own experiences
- Challenge your mentee to step outside of his/her comfort zone.
- Hold your mentee accountable to accomplish his/her goals.



Mentorship Best Practices

- Set expectations together
 - Determine what you both would like to get out of this relationship (goals) and discuss them collectively
- Talk through your calendars and set up future dates to meet
 - Planning in advance helps keeping you both accountable.
 - Discuss where to meet and how frequently you want to get together.
- Communicate
 - Building honesty and trust is essential to a successful relationship.
 - Make sure you both try to understand your different perspectives. Ask questions or clear up any misunderstandings.



Why Mentoring Matters



71% of major companies know
that people with mentors
do better at work

Positive Impacts of Mentorship



MENTEE

- Increase visibility within the professional community
- Develop skills that support advancement and career growth
- Prepare for complexities of new roles and assignments
- Help overcome the “double bind”



MENTOR

- Shape next generation of leaders
- Expand leadership competencies
- Increase personal and professional satisfaction
- Boost organizational commitment
- Gain valuable insights, learning, and feedback
- Broaden network and access to information

Types of Mentoring Relationships

Formal
Mentoring



Informal
Mentoring



Situational
Mentoring



Reverse
Mentoring



Mentoring in a Virtual World

- Make things informal and incorporate your regular routine
- Share and distribute resources afterward
- Be considerate about timing and schedule
- Be prepared for distractions that may come up
- Experiment with different kinds of communication options
- Use empathy to communicate effectively
- Emphasize connection tools and technology



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Phases of the Mentorship Program

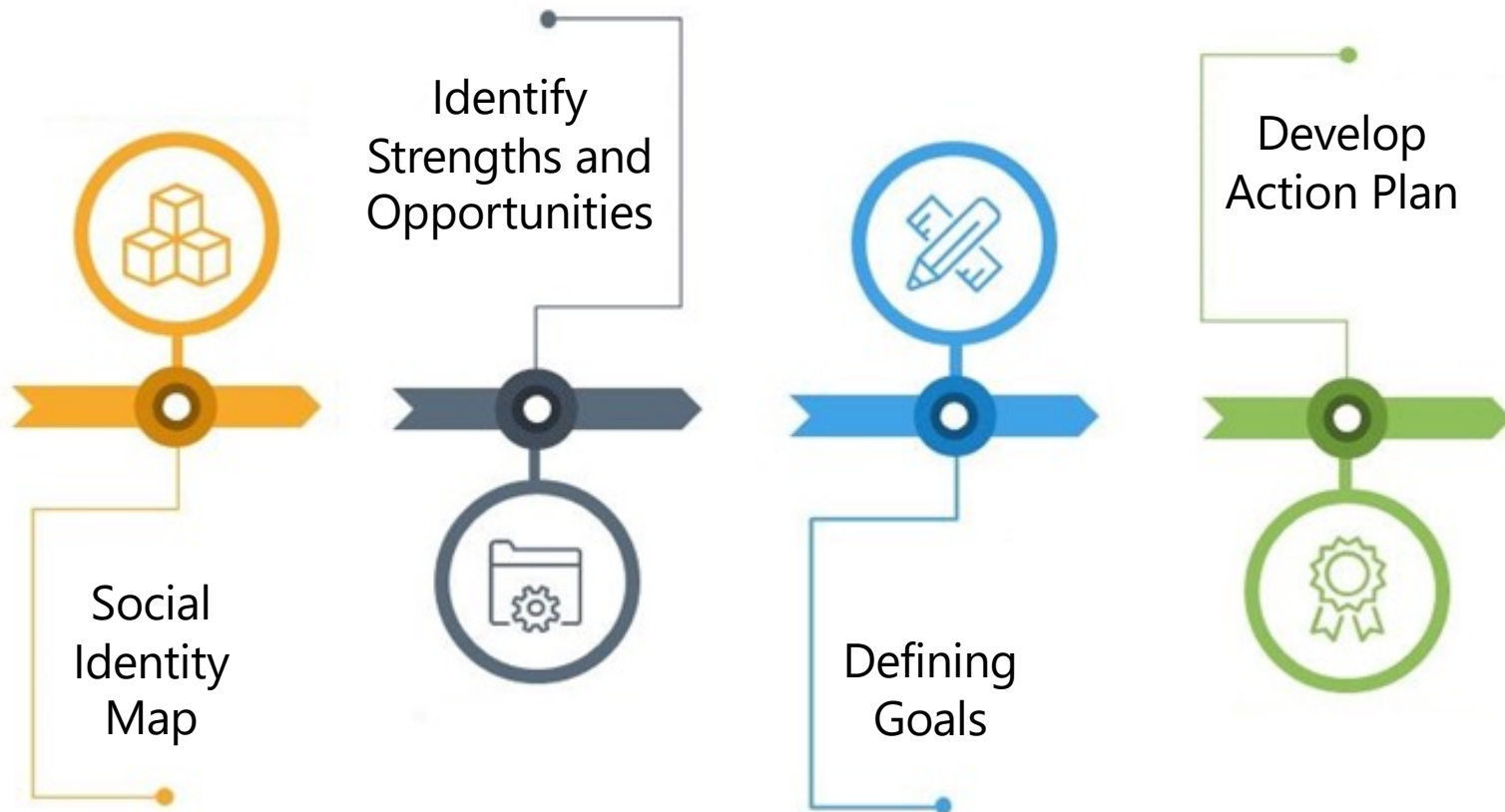
Mentorship Program Phases



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Mentorship Foundations

Guide to Your First Meeting





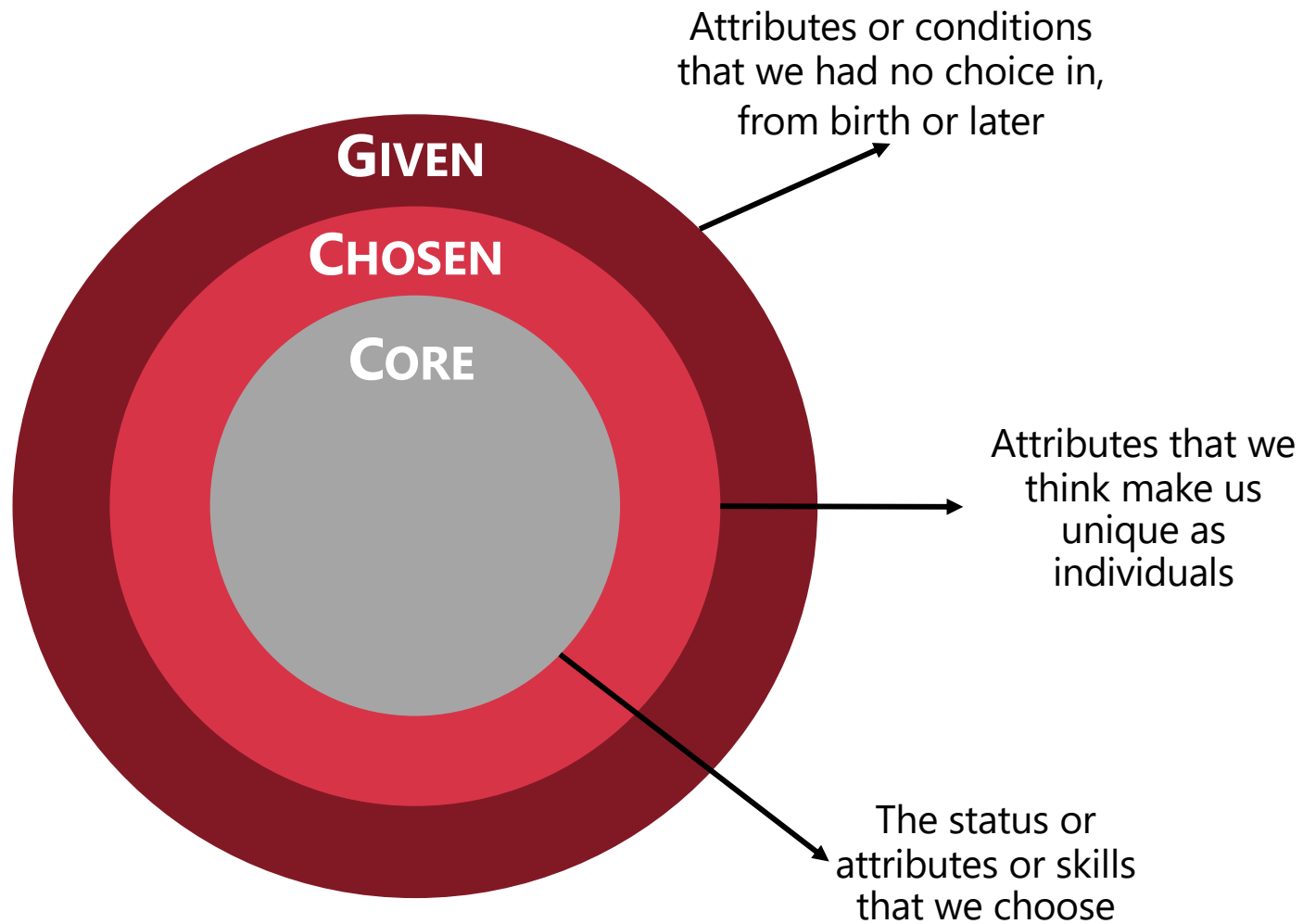
Social Identity Map

Culture and Social Identity

- We all have multiple identities
- It's human nature to want to "fit in" as well as to be unique
- Some identities are visible, others are less apparent
- Some identities are accepted, some are taboo
- You continually gain, lose, or change certain aspects of your identity, while others are fixed
- Context affects which identities are most important, helpful, or harmful



Identity Layers





Evaluate Current State

Evaluate Current State

- Review Mentee's Intake Questionnaire that will include:
 - Educational and professional background
 - Professional highlights
 - Identification of strengths and areas of development
- Establish expectations for the program
- Share hobbies/interests outside of work

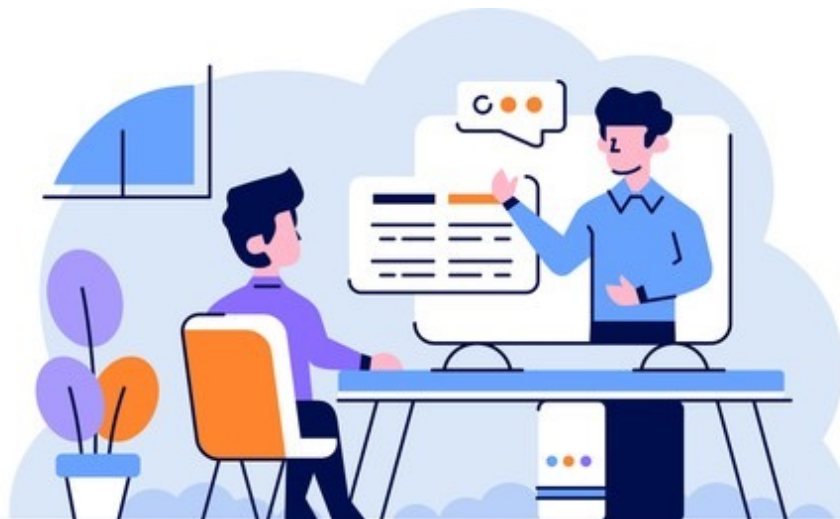




Define Goals

Goal Expectations

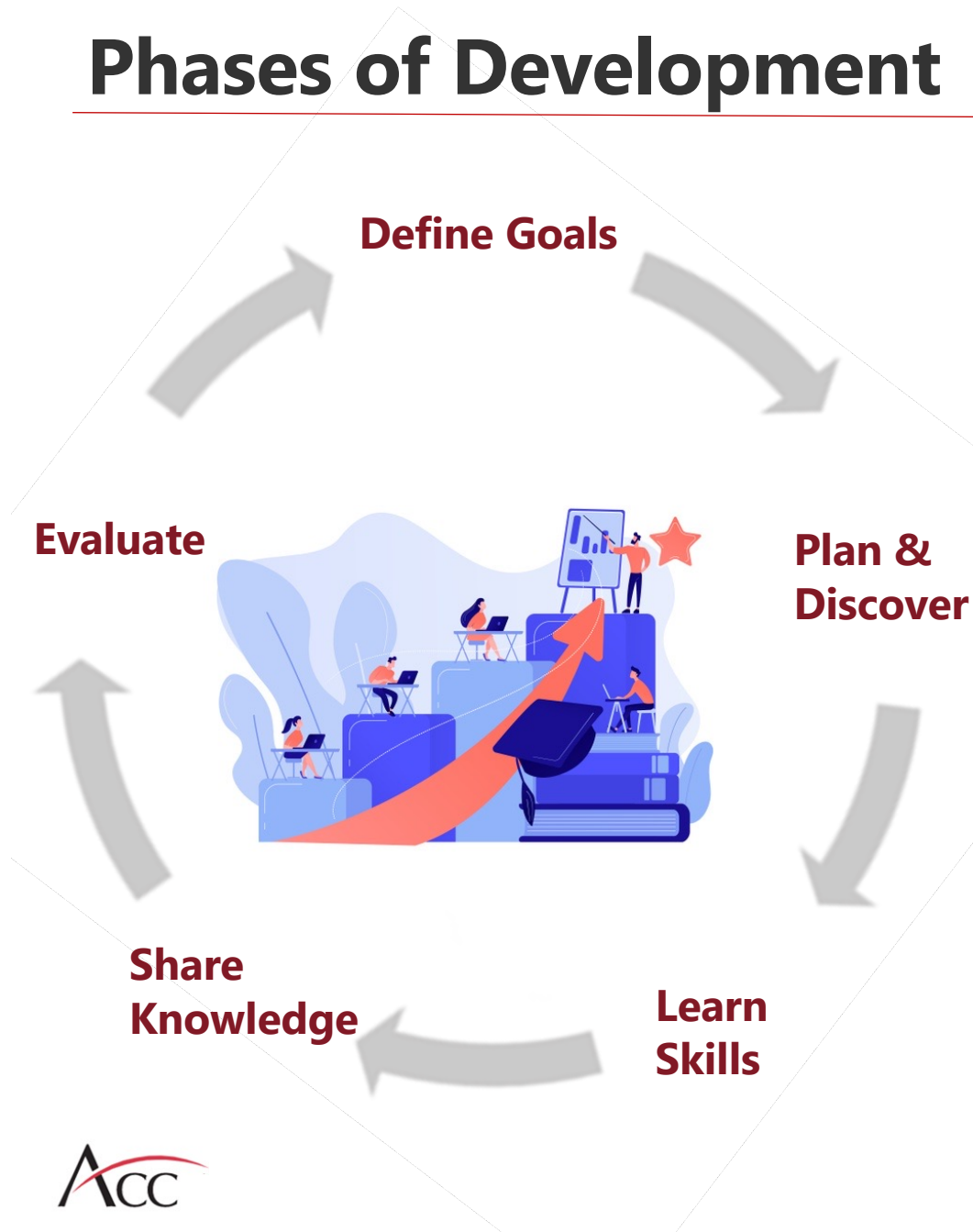
- Define short-term goals (to be achieved within 1-2 years) and long-term goals (to be reached within 2-5 years)
 - Goals should be narrow and well defined
 - The short-term goals should support and be aligned with long-term goals
 - Short-term goals should be skilled focus (rather than outcome focused)
- Decide whether to focus on one goal at a time or to advance work on multiple goals simultaneously





Establish Action Plan

Phases of Development



1. **GOAL IDENTIFICATION PHASE:** Establishing goals to reach your career aspiration focusing on skills.
2. **DISCOVERY PHASE:** Identifying knowledge gaps and what needs to be learned to achieve the identified goals.
3. **LEARNING PHASE:** Fill the knowledge gaps via i) individual learning, (ii) peer learning, and / or (iii) facilitated learning
4. **SHOWCASING PHASE:** Seeking opportunities to showcase newly acquired skills.
5. **EVALUATION PHASE:** Reflecting on lessons and knowledge learned.

Goal Action Plans

DEFINING GOALS	
Short Term Goals (to be achieved within 1-2 years)	
Long-Term Goals (to be achieved within 2-5 years)	

GOAL ACTION PLANS	
[Enter Goal Identified Above]	
Phase	Defined Actions
Discovery	
Individual Learning	
Peer Learning	
Facilitated Group Learning	
Showcasing	
Evaluation	



Mentorship Program Kickoff

New to In-house Committee