



Mentoring Matters

Experiences and Insights for Your Organization

By Mike Harris – CEO of Patina Solutions



CAMEO

COACHING & MENTORING BY PATINA



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Consider the benefits a mentoring relationship brings companies that are managing change and growth –

- Mentoring from proven executives provides guidance and insights to help people grow their skills and capabilities.
- High-potential talent become assets of increasing value to your organization as their contributions improve and drive results. A successful mentor is a good source of development, advice, information and unbiased perspective, who can leverage career experiences and learnings to help mentees develop stronger competencies and capabilities.
- Mentors help mentees navigate new experiences, increase competency and accelerate learning.
- Mentors help mentees avoid mistakes and manage and mitigate risks associated with inexperience.

Not surprised? Then why do so many companies say they struggle to find, qualify and engage a mentor who can help the mentee drive business success?

Internal versus External Mentors

As a frequent business advisor, I'm often asked whether I've seen companies get more value from using internal or external mentors to help develop their best talent. My response: There's no one-size-fits-all answer. I believe there is value to engaging both types of mentors – and for many companies the best solution is a customized mix.

Internal mentors can help mentees navigate company waters and politics and can help mentees build relationships inside the organization. External mentors may be more likely to challenge mentees, expose them to multiple external perspectives or to be a confidential sounding board. And, for external mentors, focusing on each mentee's goals and circumstances are the mentors' primary focus.

I've seen some of the best internal mentoring programs falter when mentors – who are often busy executives – do not really have time to mentor properly. These dynamics are the reason so many individuals and corporate HR and talent development leaders look for external mentors to provide objective guidance without the bias of an "insider."

Steelcase Inc.'s Jeremy Bergwerff experienced that need after he searched the Steelcase ranks for an in-house mentor who could guide his transition into a newly created role at the manufacturer of office

Workplace mentoring can be defined as the act of a knowledgeable person training and advising another with less experience, resulting in:

Increased employee job satisfaction

Improvement in workforce productivity

Reduction in mistakes

Knowledge transfer

furniture and work environments.

Then just 34, Bergwerff, the managing director of Steelcase's Event Experiences, was younger than most of the people on the team he now managed. The move also required Bergwerff to shift from an independent-contributor role with heavy finance responsibilities to the manager of a cross-disciplinary team that's creating, vetting and deploying new venture concepts. He wanted

to learn leader soft skills, people management techniques, product development processes and go-to-market strategies.

"My colleagues were available for occasional conversations, but all were steeped in their own work and didn't have the depth and duration for the type of mentoring I was looking for," Bergwerff said. "Being a mentor was way down on their list of priorities, and it certainly wasn't their responsibility. I was frustrated.

COACHING?

OR

MENTORING?

To some, there's little difference between mentoring and coaching. Leaders of Patina Solutions, creators of CAMEO, use this chart to show examples of each.

Examples of Coaching

Team Coaching:

- An organization is growing rapidly and must prepare its leaders for oncoming organizational changes and competitive threats.
- An organization is going through extensive transformation in order to drive innovation and position itself to lead disruption in its industry. The leadership team must prepare for the cultural and talent impacts of this transformation.
- A team is struggling with trust issues and as a result they are not helping each other succeed. This dysfunction is causing the company to miss sales targets. Something needs to be done to make this team of eight leaders more successful together.

Individual Coaching:

- An executive is an ineffective communicator in group settings, which is hurting his credibility, ability to engage and influence his peers and subordinates and his ability to get results through others.
- A talented leader with superb technical acumen in her field struggles with being an effective manager. She is causing stress in the function she runs. Her manager is concerned that this will cause issues with high turnover and that low morale will continue to grow. This leader is not aware of the negative impact she is having on the company and her team, which is resulting in increased cost and disruption.

Examples of Mentoring

- A controller is showing promise and is likely to be promoted to the CFO role in the next year. She seeks to work with someone from outside the company who has been on the same career path in the past to prepare for the promotion and gain practical tips on how to be successful in a new role.
- A sales leader has been asked to develop a plan for expansion of several company product lines into Latin America. With no prior experience in this area inside the company, he wants to talk with someone who has done this before to discuss how to get started and what to watch out for in the process. Ideally, he can talk with a U.S. executive and a Latin American executive to get the whole picture.
- A family-owned company has identified the succession leader who will take on the CEO role once the incumbent retires. The successor is the CEO's son, who is currently working in the business and has never had another significant professional job. To be prepared for leadership and the generational transition, both the incumbent CEO and his son would like to gain an external and fresh perspective of someone who has been through this type of generational transition. Their goal is to understand how to handle the passing of the baton between them, how to prepare the organization for a new leader and to identify potential cultural impacts relating to the differences in style between the two leaders.

I just wasn't sure that I could develop the skills I needed on my own."

Bergwerff's situation was not unique. Today's already lean-and-mean companies are facing new pressures as their pursuit of innovation pushes them into unfamiliar territories, and as they digest large waves of workers leaving for retirement. Business experts estimate that 10,000 Baby Boomers become eligible to retire each day. The next generation in line, Generation X, is just over half as large as the Baby Boomer generation. That reality is forcing Millennial generation workers and others to step into higher skilled roles – sometimes before they are really ready.

Preparing New Leaders

"So often companies promote people but don't take inventory of skill gaps, which might exist simply because the person hasn't needed to use those skills in prior roles," said Jill Dark, Steelcase's chief talent transformation officer and director of the company's strategic workforce architecture and transformation team. "I think this oversight is becoming a more-obvious pain point for companies."

In his new role, Bergwerff not only managed people for the first time, his team was responsible for creating new concepts and quickly delivering big results. "This is exactly the type of situation where mentors can be extremely helpful," Dark said.

Steelcase has a robust internal mentoring program, but Dark wasn't surprised by the disappointing results Bergwerff shared about his internal search.

"Internal mentoring, no matter how established and robust a company's program might be, is not likely to meet the needs of every person who seeks a mentor," Dark said, adding that such challenges are common when searching for mentors to help with complex needs or specific skills.

In his case, Bergwerff was looking for a mentor with experience creating a product or service from nothing and then growing that creation quickly.



"The external mentors with CAMEO are there to be mentors. That's their number one priority. They're going to be focused on their mentee, not thinking about their next meeting."

~Jill Dark, Purchaser of Mentor Services, Steelcase

"That's a hard person to find in general, let alone to find among your peers," Dark said. Dark's suggestion: Look outside of Steelcase. But that's easier said than done. Googling terms like "find a mentor" or "mentor match" returns tens of millions of hits, which range from ads for professional mentors to articles with insights and advice. Talk about a needle in a haystack.

As it happened, just a short time before her conversation with Bergwerff, Dark had a conversation with a long-time Steelcase leader about how he would spend his days after his upcoming retirement. He said he was going to try business consulting and mentoring with us at Patina Solutions, an organization of experienced professionals who help companies achieve specific objectives. He also said he was creating a profile to be a mentor with CAMEO, a robust end-to-end talent development system built on a technology-based program that matches mentees and mentors based on desired competency development, skills and experience and

WHEN TO SEEK EXTERNAL MENTORING

1. **Your organization is changing, such as by expanding geographically or operationally, planning to go public or preparing to merge.** Aggressive change, whether it's desired or not, often comes with uncertainty and questions. An external mentor can share what worked – and what didn't – for them and provide critical feedback that can help an employee add value to your company's plans.
2. **Your industry is changing.** No matter the industry, innovation is essential. Companies that aren't moving forward are probably falling behind – and could be headed toward failure. External mentors offer ideas and concepts from other industries or specialization areas, which can spark creative thinking, connect new dots and drive inspired innovation.
3. **You're having retention issues.** It's been said people don't leave companies, they leave managers who don't help employees feel valued, engaged or like they're learning new skills. Mentoring is a high-value way to improve a manager's ability to support and grow people.
4. **You're facing a talent cliff.** Each day, 10,000 Baby Boomers reach retirement age, leaving a looming "talent cliff" in their wake. External resources can share lessons, experiences and approaches to prepare and bolster young leaders for challenging roles.
5. **Your employees lack critical skills.** Organizations are asking workers to take on bigger responsibilities earlier in their careers, making it increasingly important to give them the tools and knowledge they need to succeed. While paying for an employee's executive MBA may be cost-prohibitive, mentoring is a flexible, affordable alternative.
6. **Your internal mentors are tapped out.** This impacts many organizations as the talent faces change, additional responsibilities and disruption. They often do not have the bandwidth to dedicate to a mentee.

personality traits.

Bergwerff was Dark's first referral to CAMEO. Since then she's recommended Patina's mentoring solutions to two other Steelcase employees. In addition to having mentor prospects available and able to quickly jump into the mentoring process, Dark said, "I liked that the CAMEO

mentors would have perspectives different than those coming from people internally. They wouldn't know our business. They might ask questions that elicit a different response."

Benefits of Using Outside Mentors

For reasons that go beyond even those already

mentioned, companies are starting to turn to external mentoring to help their key workers develop critical business skills. These mentors share experiences and empower mentees to tackle similar challenges successfully.

“An outside mentor is probably more likely to ask tough questions,” said Bill Bundy, Patina mentor and retired CEO of Michigan furniture maker Trendway Corp. “Sometimes it’s the process of having to answer really tough questions and work through difficult conversations that help people



“Patina’s CAMEO figures out whether a person is a good coach or mentor, but also if that person is an expert who might not succeed when helping others in a mentoring role. Being an expert doesn’t automatically make someone a good mentor, and this can be difficult to identify when the pairings are being done internally.”

~Roshini Rajkumar, Patina Mentor

grow the most. But sometimes those aren’t conversations you’ll want to have with someone you’re going to see again at work.”

Another perk: Safe avoidance of office politics. “When I talked with my external mentors, I never had to worry about something I said being

misconstrued,” said Renee Citera, an executive who in 2017 traded her three-decade career in the legal and business publishing industries to become a corporate consultant and professional mentor. “There’s a benefit to not having to put a filter on what I was saying.”

Now a Patina mentor to Steelcase’s Bergwerff, Citera shares insights and tips learned during 27 years with LexisNexis and five years with smaller companies. Both see value in their decision to build the relationship with different industry backgrounds. Bergwerff likes Citera’s experience building and managing teams, identifying business partnerships, and launching new products – including some that generated \$75 million in annual sales.

“As I’ve pursued my goals, I’ve been able to meet those goals in part because of the ways Renee helped me prepare,” Bergwerff said. “Sometimes it’s hearing her stories or answers to the questions I had. Sometimes it’s the way she knows exactly what I’m grappling with because she’s been there. This mentoring partnership with Patina and Renee is an emotional comfort and encouragement, but it’s also tangible information and direct answers that I can respond to and immediately put into practice.”

Increasing Mentor Pools

To be sure, the business world has no shortage of available mentors. That pool is expected to grow larger as newly retired Baby Boomers decide they want to pass along their experience and knowledge to developing professionals, earn extra cash or stay current in business happenings. Patina Solutions gives mentees an easy way to identify mentors likely to be a good fit.

The proprietary software powering Patina’s CAMEO talent development system is like a dating service with a human resources twist. Mentees and mentors answer online questions about functional areas, specialties, competencies and styles. Using algorithms, the software searches for and selects multiple aligned mentors for consideration.

“We liked how CAMEO let mentees choose from mentors who came from a wide range of industries and who had diverse experiences and knowledge,” said Alicia Millard, senior director of Human Resources at WEA Trust, a not-for-profit provider of group health insurance and administrative services to public employers throughout Wisconsin. Millard was on the WEA Trust team that in early

2016 engaged CAMEO for mentoring 19 leaders and managers who were director level or above. Millard, a long-time HR professional who had experienced mentoring programs at previous employers, also participated as a mentee. At the time, Millard was moving into a new role leading the HR function. She jumped at the opportunity to strengthen her strategic leadership abilities,

MENTORING MYSTERY: When to take mentoring outside?

Step 1: Identify whether you need – and want – a mentor.

Step 2: Identify how the ideal mentor can help.

Step 3: Get a mentor.

As simple as it may sound, the third step can be a surprising hurdle, even for HR and people-development teams charged with making successful mentor pairs. The following list hits a handful of pros and cons that can help drive this decision.

EXTERNAL MENTORING

PROS

- Outside viewpoints and different perspectives can spark creative solutions
- Simple matching process
- Mentors through Patina Solutions are nominated and screened
- Safe, confidential conversations – no concerns about office politics or potential repercussions
- Deep pool of mentors with wide-ranging experience and expertise (including mentors in other industries or with multi-industry insights)
- Clear service terms and expectations
- Quick, new pairings if mentees' objectives change

CONS

- Budget required
- Mentor may need to ramp up on company or team dynamics

INTERNAL MENTORING

PROS

- No fees
- Mentor should understand company and team dynamics

CONS

- Conversations may need to be filtered (office politics or sensitivities)
- Failed pairing or misunderstandings could harm mentee's reputation
- Mentors don't have time, interest or relevant expertise
- Narrow mentor perspective
- Administrative time coordinating match and following up on results
- Mentor's time away from other company priorities

fine tune her leadership style, increase her emotional intelligence and bolster credibility as a member of the corporate leadership team.

"I have a nimble style and tend to move very quickly," she said. "That can be jarring to people who need time to react and adjust." Among the many benefits Millard says she gained as a mentee, Millard says her Patina mentor, a woman with HR executive leadership experience, helped Millard set a master vision others could see and support, and also have conversations or take smaller actions that would increase buy in and help employees feel involved. "I can still move quickly, but I've learned the value of focusing on my approach and bringing people along through the process so the end feels like a win-win for everyone, and especially the organization."

Tapping the insights and experiences of external mentors was powerfully beneficial for many of the WEA Trust mentees, said Millard, who in her HR role as HR leader was able to hear the experiences of her fellow mentees.

"The majority of the mentees said they learned things and liked the time with their mentors and liked that they could ask tough questions and be vulnerable," she said. Still, "there are a few things I wished we'd done differently."

The biggest change she'd make: Go in with an idea of the purpose of what you as a company are trying to achieve from the mentoring relationships. Then make sure both the mentees and mentors are aware of those goals.

"We let the mentees choose their own development areas to focus on, and a few weren't as connected to the success of the business as we would have liked them to be," she said.

In the year since Millard and her Patina mentor

wrapped up the initiative, Millard says her mentor's words and insights still come back to mind. That's one indication the relationship was time and money well spent.

"When working professionals get busy, personal and professional development is the first thing to fall by the wayside," Millard said. "But continuous development and taking time to improve yourself gives you an opportunity to look at things in a different way, and that is what will make you a strong leader. It's so important to keep development opportunities on your plate."

Keeping Your High-Potential Employees

When Dan Smith offered outside mentoring for seven high-potential employees, each working their way through an intensive executive MBA program, he also turned

to Patina's CAMEO talent development system for help making matches.

"Most organizations understand the value that comes from mentoring relationships," Smith said. "The struggle is getting good quality from that mentoring relationship."

As the director of Spectrum Health University, Smith is responsible for all professional and leader



"I remember putting in my criteria and being intrigued by the questions they asked about the style in which I worked and the style of responses and support I might expect a mentor to give me. The length of the survey and the depth of the questions built confidence in me that the mentor I ultimately chose would be a good fit."
~Jeremy Bergwerff, Mentee

STEPS FOR SUCCESS

As with so much in life, the benefits from mentoring are directly proportional to the effort mentees put in. To prepare for a successful experience:

1

Define the purpose of the program and what success will look like. Spell out the qualities you'd like to develop in employees, such as better strategic planning skills, and use those specifics to measure program success. Many organizations also track employee retention, promotions and engagement to gauge program effectiveness.

2

Determine who will set up and administer the program. The best-intentioned mentoring programs can fade quickly without a dedicated champion.

3

Ask employees to consider what type of mentor or mentors would be a good fit, including industry, company role, specific business experience and personality. Sometimes employees can benefit from working with mentors in different industries or specialization areas, such as a new C-suite member getting insights and education from a mentor with a strong finance background.

4

Have clear goals. Employees should clearly identify what they want to accomplish with their mentors and give the mentor access to their personality assessments, performance reviews and other information the mentor can use to develop a roadmap for the relationship. Sending discussion topics in advance to mentors will make the relationship more productive.

5

Track key metrics. Program participation and employee satisfaction results can help determine whether a program is working for your company. Consider partnering with an external mentoring organization that can pair employees with new mentors if they move into different company roles or need support in several areas.

While developing quality employees isn't easy, help is available on demand. Tapping the expertise of external mentors can help you ensure the pool at the bottom of the talent cliff is a deep one.

development initiatives at Spectrum Health, a not-for-profit health system with about 26,000 employees and 12 hospitals in West Michigan.

"The students really wanted access to people with relevant and related experiences, people who were outside of the organization so they could be open

and vulnerable with them, and people who they could bounce ideas off of," he said.

Making mentoring matches can be an administrative headache, Smith said. CAMEO removed that pain and increased the probability of success. In addition to the matching process,

Patina facilitates the successful “onboarding” of the mentor and mentee pairing at the beginning, a step that ensures an agreement is in place that drives the commitment to meet to communicate and to measure. Patina also checks in periodically to make certain that the mentor/mentee relationship is running smoothly and effectively.

“We had pretty specific demands and requirements for the types of mentors we were looking for our executive MBAs to have access to,” Smith said. “The size of the CAMEO pool of mentors was large enough that even after applying our filters, they were able to offer many top-notch choices. I think this is something a smaller or regional mentor matching service would have really struggled with.”

How did the process turn out for the students?
“Very good,” Smith said, adding that two of the seven students extended the mentoring relationship beyond the initial contract.

“In my role, I’m always on the side of investing in your leaders or in the high-potential people who are going to become your leaders,” he said. “Organizations almost always get back multiples of returns when they make investments like this in their people.”

In Conclusion

Mentoring has long been an excellent way to show your company’s most-important leaders and high-potential contributors how much they’re valued by your organization. It certainly helps companies develop and better retain top talent. Patina’s CAMEO talent development system now makes that external mentor matching process simple, fast and cost effective. In addition to Steelcase, WEA Trust, and Spectrum Health, organizations such as Briggs and Stratton and UP Health System are using the system as well.

Circling back to that earlier question of whether companies get the most value and their highest people-development results from using internal or external mentors, I hope you’ve seen the benefits of using a blend of both. For many companies, that’s a blend that shifts its proportions as the company’s needs change and as the skills and knowledge mentees seek become more challenging and complex.

One thing is certain. As seen time and again for businesses and individuals – mentoring matters.





About CAMEO by Patina Solutions

CAMEO by Patina is one of the nation's leading talent development platforms for finding and engaging professional external coaches and mentors on-demand. Developed and deployed by Patina Solutions, CAMEO connects mentees seeking advice and new skills access to thousands of mentors via an easy-to-use, flexible and cost-effective solution that's fast, offered nationwide and available on demand. From seeking an external mentor for a single employee to meeting the needs of several dozen employees, companies have used Patina Solutions' CAMEO development system as a full-service solution. The combination of coaches and mentors in an easy-to-use, on-line platform increases powerful options available.

Patina Solutions is a founding member of Globalise, a global network of more than 30,000 experts who help companies meet specific management and organizational needs on-demand – often on very short notice. In addition to providing interim executives and managers and executing on key projects – Patina provides external mentor matching for domestic and international needs.

About Mike Harris

Mike Harris is a proven entrepreneur who has launched and grown many successful professional service companies. These days he is CEO of Patina Solutions. An individual who sees patterns where others see chaos, Mike early on saw the benefits external mentors could bring companies – if only the companies could find them. CAMEO was Mike's brainchild.



"Mentoring is a natural extension of Patina's core offerings using highly experienced executives, and the creation of CAMEO became a calling I couldn't ignore," Harris said. "Corporate response to CAMEO has surprised even me. It's been quite rewarding to see the positive results and impact CAMEO pairings have generated for our clients."

Mike also is a speaker on topics that range from embarking on entrepreneurial endeavors to successfully stepping in as an interim executive. He also authored a book called *Career 180s* to help people prepare for a totally new career.

Where would Patina's experience benefit you?

Learn how Patina can help you accelerate success:

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