Group mentoring best practices

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Abstract

Purpose – *This paper seeks to describe best practices for designing and implementing mentoring groups.*

Design/methodology/approach – *Researchers used a 12-question survey and personal interviews to assess the relevancy and success of group mentoring. Best practices for design and implementation evolved out of this research.*

Findings – *Learners would like more opportunities to engage in group mentoring and peer learning. This practice offers an attractive alternative to traditional training because it is fast and flexible, it is cost-effective, and it fosters relational learning. Groups should be formed that focus on relevant topics related to learners' needs, without concern if groups meet face-to-face or virtually. Advisors should set the direction for the groups, create an engaging atmosphere, and provide good resources.*

Research limitations/implications – *Further research with a larger survey population would be valuable, particularly as the use of group mentoring expands.*

Practical implications – *Allowing employees to spend more time on peer learning through group mentoring can provide organizations with a low-cost method for sharing practical, contextualized knowledge that people can rapidly apply back on the job.*

Originality/value – *All content in this paper is new. Readers will discover best practices based on the latest research in group mentoring and collaborative learning.*

Keywords *Mentors, Mentoring, Learning, Group mentoring, Collaborative learning*

Paper type *General review*

Introduction

Group mentoring is emerging as a best practice in the training and development world. A cost-effective way to leverage learning resources in order to expand knowledge and skills across the enterprise, group mentoring was the subject of research conducted by Triple Creek in late 2009-early 2010. In the article ''Group mentoring: rapid multiplication of learning'' published in the previous issue of this journal (Emelo, 2011), I analyzed Triple Creek's research findings and examined the impact group mentoring can have on individuals and organizations. Part two of this series will now look at best practices for designing and implementing group mentoring based on our research findings and client input. A case study from CDW Corporation will help show how group mentoring can work in today's global organizations.

Flexible, relational learning

In the past two years, Triple Creek has seen the number of our clients using group mentoring grow from six to more than 20, with a dozen more in the planning process. One organization leading this expansion into the use of group mentoring is Illinois-based CDW Corporation, a leading provider of technology products and services for business, government and education. Having already successfully leveraged one-to-one mentoring to expand peer

learning among their 6,200 coworkers in 23 locations across the USA and Canada, CDW decided to take advantage of group mentoring capabilities within Open Mentoring® to target high-potential employees.

''Our Corporate Leadership Council tested over 300 different ways to improve coworker potential, and found that few truly build potential'', says Danielle Krupinski, Manager, Organizational Capability at CDW. ''However, there are three development practices that have the strongest impact on potential. These include: building strong professional high-potential networks, demonstrating a credible commitment to development, and offering high-risk leadership experiences that accelerate learning''. All of these practices blend seamlessly with group mentoring activities.

CDW piloted group mentoring from August 2009 through March 2010 with graduates from their Sales Leadership Academy. Leaders in sales acted as advisors for the 15 group members, who are high-potential sales managers. Learners were split into two groups; one met face-to-face with all members in the Chicago office, while the other group met virtually with members spread across the USA and Canada. Each group decided their own learning topics and learners actually facilitated the groups. Survey results show that 85 percent of participants were satisfied with the program. Even more importantly, 100 percent reported that their effectiveness increased to some extent as a result of group mentoring. Participants in this program received practical, hands-on experience with sales skills that they will need in order to move up in the organization and realize their potential as future sales managers.

Based on these strong pilot results, CDW expanded its use of group mentoring in 2010 to a wider audience of high-potential employees. CDW currently run 11 groups as one part of their four-step process for developing leaders (see the Appendix), with 120 learners participating in what they term Learning Communities. Group topics are related to the most needed competencies for leaders that CDW has identified (e.g. executive presence and communicating with impact).

''By offering group mentoring as a part of our four-part leadership offering to targeted high-potential coworkers, we could incorporate the three practices that have the strongest impact on potential,'' says Krupinski. ''The learning communities have been very successful so far. Coworkers have expressed appreciation for the opportunity to expand their networks cross-functionally and for the chance to form a relationship with a senior leader they might have not known before this experience.'' CDW plans to expand its use of group mentoring in the months to come.

Organizations like CDW are choosing group mentoring as an attractive alternative to traditional training for three main reasons (see Figure 1):

1. It is fast and flexible. Instead of creating formal curricula to address currently emerging learning needs, internal experts and those with learning needs can be brought together in a few months instead of the one- to two-year cycle of traditional learning approaches.

Figure 1 Reasons to leverage group mentoring

2. It is cost-effective. Leveraging and multiplying internal expertise in both co-located and virtual environments enables an inexpensive learning approach without geographical boundaries and the limitations of formal classroom instruction or e-learning module development.

3. It fosters relational learning. Today's workers would rather connect with experts and fellow workers in a collaborative, intentional learning process than search for answers in impersonal databases or random contacts in social networking sites.

How can organizations implement this emerging strategy for development and knowledge sharing? Triple Creek's research on group mentoring brought to light several best practices that people can look to for guidance.

Best practices

Through our research on group mentoring participants and our interviews with group advisors and program managers, we sought to answer several key questions:

- What is the best way to form groups for effectiveness?
- What are the keys to being an effective group advisor?
- How much time should be invested in group mentoring events to be effective?
- Should effective groups meet face-to-face, virtually or both?

The following data offers insight into these areas (see Figure 2).

Forming groups

Two factors emerged in our research that impact the success of group mentoring programs:

1. the relevance of topics; and

2. the quality of advisors.

In our 2010 group mentoring study, 93 percent of participants found the group topics relevant to their jobs; even more importantly, 96 percent felt they could apply what they learned directly to their jobs. Of four sources of learning, the top two were directly related to the quality of the group advisors (the advisors themselves and the resources they provided).

In conjunction with these findings, three best practices emerged related to forming groups around relevant topics with top quality advisors:

1. *Trust a qualified advisor to pick the topic*. One client who participated in our survey recruited top leaders and had them develop groups that fit their own skills and passions. Based on one leader's personal experience and knowledge of the workforce, this person, who happens to be an introvert, led a group called ''The Introvert Advantage.'' The group

Figure 2 Keys to effective groups

was to help maximize the full leadership potential of top quality talent who often get overlooked because of their quiet nature.

2. *Start with an identified worker need and recruit the advisor.* In another organization, the program champion searched their configured version of Open Mentoring® for the most requested competencies in one-to-one relationships. Based on this data, the champion recruited advisors who had experience in those competency areas to lead a number of groups focused on these topics. This organization had no trouble filling groups with ready participants who were eager to learn.

3. *Start with the organizational need and recruit both advisors and learners.* A third organization in our study started with an identified organizational need for new managers to be able to have difficult conversations. They then identified subject matter experts who could lead these groups and formed invitation-only groups to work through a clearly defined process to achieve measurable improvement in this skill. During the group meetings, participants discussed key principles, practiced their conversations and debriefed actual workplace experiences.

All of these approaches were successful because they combined actual participant learning needs with first-rate advisors.

Role of the group advisor

Triple Creek's research revealed that the role of the advisors can vary widely based on the purpose of the groups. In skill-oriented groups like the one focused on learning to have difficult conversations, advisors functioned as coaches, sharing personal experiences, assigning exercises and debriefing actual practice sessions. In other groups, advisors offered subject matter expertise and led more informal discussions.

Based on our analysis of learner comments, three best practices presented themselves for ways that advisors can maximize group effectiveness:

1. *Create an engaging atmosphere of collaboration.* Setting the right collaborative tone by sharing some personal information and providing ways for participants to get to know one another arose as critical actions for advisors. One participant wrote, ''The only suggestion I'd make for improvement would be to send a short abstract introducing ourselves to other group members at the beginning to let us know who we were speaking with prior to the initial group calls. That may help foster trust and engagement at an earlier stage of the group's development.'' Another learner said that ''opportunities to connect with other members of the group outside the mentoring meeting to do exercises and to network'' would have been beneficial. Our research supports this request, with 72 percent of participants finding their peers to be excellent sources of information in the group experience. Maximizing collaboration allows organizations to leverage even more learning in the group.

2. *Set direction and keep the group focused on learning objectives.* Groups functioned best with clear learning goals and focused discussions. It did not matter whether the goals were set by the advisors or the learners; the important thing was that all parties maintained commitment to the learning objectives. As one participant commented, ''The experience is more valuable when the goal for the mentoring group is clear and shared by

all members.'' This enables participants to take their assignments seriously and helps advisors to manage the group discussions more effectively. While the group discussion was one of the most valuable parts of the mentoring experience, frustration was expressed by those who felt it occasionally wandered too far off topic and degenerated into ''war stories.''

3. *Be available and provide good resources.* The power of group mentoring comes from the knowledge shared and the interaction between all participants. Effective advisors are accessible, engaging and in the moment when interacting with learners. Our research showed that these were strengths of the advisors surveyed, with the two highest rated sources of information being the advisors (86 percent) and the resources they provided (80 percent). The learners appreciated the experience and wisdom that advisors brought to the groups, as was evident in comments from the learners. For example, one person said, ''I most appreciate the mentor [for their] vast experience,'' going on to say that the advisor was a ''terrific communicator [who] set expectations and followed through.'' This learner ended their praise for the advisor by describing this person as ''incredibly helpful, open, approachable – wonderful!''

The importance of providing strong and relevant resources presents itself in the following learner comment: ''Even though I wasn't able to attend all of the meetings, I was still able to follow the topics and the reading material was great. Understanding and applying the information has already paid dividends in my career development as I'm able to recognize and adjust to situational demands more effectively.'' The influence of the advisor and the suggested resources can be seen in improvements back on the job for this learner, tangible factors that organizations can take advantage of.

Time spent on group mentoring

Another best practice area evidenced through our research relates to the time spent on group mentoring. More than a few people expressed a desire to spend more time on group mentoring events each month, with specific requests centering around meeting more often and having follow-up interactions to the meetings. The typical group met once a month, which was not frequent enough to satisfy some learners. Suggestions included meeting at least twice a month and spending more than just three hours a month on group mentoring. Our primary suggestion is to schedule formal group meetings on a timetable that fits both organizational sensibilities and reasonable individual commitments. Letting the groups decide for themselves puts the participants in control and allows them to adjust their expectations and schedules as needed.

In addition, several learners expressed a desire for more relationships or ongoing engagements with fellow participants. One learner even said, ''I would like to have been paired with a 'peer' support within the group that I could contact as required to discuss related issues, challenges and possible solutions.'' This is a wonderful suggestion that encourages interaction outside of the group but continues the learning taking place. One of the benefits of group mentoring is the peer connection that can occur. As stated earlier, our research showed that 72 percent of participants found their fellow group peers to be sound sources of learning. Encouraging peers to continue to meet with one another between meetings and to make their learning part of their everyday lives helps support continual improvement and learning.

Lastly, one participant suggested that the group meet again a few months after the last official meeting as a check-in to see how learners were doing and if they were successful in applying what they learned back on the job. This is an excellent suggestion and further supports the argument that group mentoring is about lifelong learning and practical application. Giving participants the opportunity to meet again and to see how ideas were put to use will help cement the practice of group mentoring as a long-term benefit for everyone involved.

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Face-to-face versus virtual groups

While groups that were part of our research could meet virtually or face-to-face (or a combination of the two), we had only one sub-segment in our sample conduct all groups as face-to-face. This enabled us to compare their data against the norms established as a whole through our research study. Upon analysis, we found no statistically significant difference between responses from face-to-face groups and virtual groups.

While some people expressed a desire for some form of personal interaction, such as using video or virtual meeting technology, the benefits of group mentoring were felt regardless of how participants met. This data should allow large organizations with a dispersed workforce to feel secure in the knowledge that virtual groups across all of the corporate locations will be effective and worthwhile.

In fact, several participants noted advantages of virtual groups, with one person saying that ''seeing other aspects of the company that otherwise would have remained by-and-large hidden'' was a benefit of virtual groups. Because these groups can be large, diverse, and include employees from all sections and locations in the organization, leadership can encourage and support information sharing amongst all employees that would otherwise never have occurred. This creates a more open, knowledgeable workforce that can bring about positive impacts on the organization as a whole. As one group member said, ''The diversity in geographies and thoughts of the group made the interactions very interesting.''

The cross-functional, multi-location nature of groups brings with it a wealth of opportunity. Organizations would be wise to tap into this underutilized practice as they strive to do more with less. As was best described by one participant: ''Meeting other associates in different working situations brought a wide variety of perspectives that greatly expanded my understanding of the company.'' Therein lies the power of group mentoring.

Expanded thinking

As training and development professionals stand poised to take advantage of the learning capabilities inherent within group mentoring, I offer one last best practice. Expand your thinking on the concepts of group mentoring. View it as topical learning that occurs in a peer environment. This will help set the right expectations for learners, advisors and program administrators alike, and it can create endless opportunities for open, ongoing learning.

Group mentoring will continue to grow as a flexible, low-cost and effective way to strategically increase learning across organizations. The rapid adoption of group mentoring by our clients and the large-scale implementation of group mentoring by world-class organizations like CDW support this observation. Each organization seems to approach group mentoring with differing needs, fashioning a wide variety of group mentoring initiatives accordingly. Yet, the results all seem to be the same: positive impacts on individual productivity and effectiveness, and gains for organizations as they leverage new ways to develop vast amounts of talent. Group mentoring fits smoothly into these endeavors.

Reference

Emelo, R. (2011), ''Group mentoring: rapid multiplication of learning'', *Industrial and Commercial Training*, Vol. 43 No. 3, pp. 136-45.

Appendix: Four-step process for developing leaders at CDW

Illinois-based CDW runs leadership development mentoring groups based on their most needed competencies for leaders. Competency areas have included executive presence, communicating with impact, and developing direct reports and others. For each of the competency areas identified, high-potential learners participate in mentoring groups that focus on one particular competency, learning about a different topic within that competency area each month over the course of four months.

The following explains the four-step process CDW uses with these future leaders.

Step 1. Complete an assessment

Each learner completes an assessment that is unique for the topic area they are learning. For example:

■ Learners in the ''Communicating with Impact'' group are given the Forte assessment.

■ The ''Developing Direct Reports and Others'' group is given an upward feedback assessment created by CDW, which is similar to a mini-360 assessment.

■ The ''Executive Presence'' group is given a self-assessment that evaluates where they are strong and where they need help; they are also videotaped presenting, which they then use as a learning tool.

Step 2: Attend orientation workshop

Group participants take part in a one-day workshop where content for their specific learning topic is presented by an executive coach facilitator. The senior leader who will be facilitating the group joins the workshop to introduce himself/herself to the learners. The mentoring program director presents an initial training of the Open Mentoring® tool so participants know the basics on how to post comments, add documents, create polls, and similar tasks. And finally, each group brainstorms topics they would like to focus on during their learning community sessions, choosing four topics to address (e.g. a past ''Communicating with Impact'' group chose to work on giving feedback, writing, multi-generational communication, and communicating around vision and strategy).

Step 3: Participate in learning communities using group mentoring

Once they have attended their orientation sessions, learners then begin active participation in a learning community using group mentoring. These communities are in place for four months and participants meet for 90 minutes once a month. Learners facilitate the groups, with each person able to choose which of the pre-approved topics they want to lead (topics were created and decided upon during their orientation workshops). Given the number of learners, topics are often facilitated by multiple people.

Step 4: Receive 1-3 hours of executive coaching

During the course of the four-month learning community, each learner receives 1-3 hours of individualized executive coaching with the executive coach facilitator who presented their initial orientation session. Individual assessments that were completed in Step 1 are reviewed by the facilitator and addressed with learners. If applicable, assessments are given again at the end of the four months to gauge progress by the learners (e.g. the ''Communicating with Impact'' group takes the Forte assessment again at the end of their four-month learning community to see how they improved).

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