Travelers EDGE
Mentoring Program
Partnership for Success

Mentee Tools and Workshop
Participant’s Guide
WORKSHOP OVERVIEW

Agenda and Supporting Materials
- Mentoring and the USA Today Mogul
- Introduction
- Mentoring: A Business Strategy
- Mentoring Overview - Benefits and Best Practices
- Pre-work Review – What Do I Need a Mentor For?
- Roles and Responsibilities – Mentor and Mentee
- Mentoring Agreement
- Developing a Mentoring Plan
- Areas of Discussion
- Mentor Meeting Action Plan (resource)
- Case Discussions
- Mutual Accountability
- Creating Your Meeting Agenda
- Panel Discussion

Workshop Objectives
- Define the mentoring partnership.
- Articulate the benefits of effective mentoring and the reasons why it is an important business strategy.
- Clarify the roles and responsibilities of the mentor and mentee and how to leverage them for success.
- Identify the elements and benefits of the mentoring agreement.
- Review mentoring case studies and discuss alternatives
- Create an agenda for your next mentoring meeting.
- Discuss real world mentoring with panelist

Are they any additional objectives that you would like to get out of the program?
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Mentoring and the USA Today Mogul

In his autobiography, Confessionals of a SOB (Double Day 1989), Al Neuharth, founder of the newspaper USA Today, told a poignant story about mentoring.

Neuharth moved to Detroit to become an assistant to Lee Hill, executive editor of the Detroit Free Press. Shortly after his arrival, he was invited to lunch by Jack Knight, owner of the Knight-Rider newspaper chain, of which the Detroit Free Press was part. They went around the corner to the posh Detroit Club where they had a cocktail. Then Jack Knight said, “Let’s go.”

Al was led six blocks to the basement lunch counter in the old Woolworth Five and Dime Store. There, Jack Knight ordered a hot dog and coke and asked Neuharth what he wanted. Al had the same. Here was this immaculately dressed multimillionaire, a Pulitzer Prize-winning writer in his own right and one of America’s most powerful media moguls, handing Al a hot dog with mustard and ketchup.

Knight then said in effect: Lee Hill will give you memberships in the Detroit Club and the Athletic Club and take you to meet the mayor and a lot of other civic leaders, and after a while you will think you are writing for them. But remember, a lot of people who buy our papers eat here every day. Ask them what they read. “Remember,” Knight continued, “don’t become captive of your own comfort. Keep your feet on the street. And don’t eat at the Detroit Club every day.”

Neuharth relates that experience directly to the thinking that years later went into the design of USA Today as a popular national tabloid.


What about Knight’s mentoring is effective?
INTRODUCTION

"Be not afraid of greatness; some are born great, some achieve greatness, and some have greatness thrust upon them."
—William Shakespeare

Welcome to **Mentoring: Partnerships for Success**

This workshop is designed to provide you with the some practical tips and advice for becoming a mentee at Travelers. It is one element of your development as part of the Travelers EDGE program. Mentoring is seen by the leaders of Travelers as a valuable process to expand development opportunities that support your personal and professional growth.

Mentoring is coaching, role modeling, advising and sponsoring the development of tomorrow’s business leaders. This partnership is a way for you to acquire business knowledge, organization savvy, and what it takes to get to the next step. We will help you develop an understanding of organization networks and complexities of Travelers matrix structure. As a mentee, you will be challenged to build leadership competence, organization networks and participate in the business at a higher level.

The mentor/mentee partnership can be characterized as a combination of formal and informal meetings. There must be some formality in the scheduling, maintaining commitments, reviewing progress against goals and other activities to be discussed within this guide. However, informality such as a spur of the moment conversation over a quick cup of coffee or a phone call to solicit some advice is also a part of the mentoring partnership.

The Travelers EDGE has asked your mentoring partner to commit to helping you build your knowledge and skills. You will be asked to meet with your mentor at least monthly, and the Program Director will be following up with both you and your mentor quarterly. Participants are expected to proactively manage the mentoring partnership.

This guide is intended to enhance your workshop experience as well as be a reference guide. We are here to support you in your mentoring partnership as a Travelers mentee. Good luck!
MENTORING
A BUSINESS STRATEGY

Mentoring is a business strategy that can yield financial, cultural and personal change. It is an important career development step contributing to the success of the organization. General Electric, Motorola, CIGNA, and PepsiCo are just a few successful companies that make leadership development and mentoring a priority. Although each may vary in their definitions and approaches, executive-high potential partnerships are a critical part of their leadership development strategy.

As defined in the Travelers EDGE Mentoring Guide.... Mentoring is a two-way relationship which can facilitate career development and organizational growth and learning. Mentoring also:

- Encourages human growth.
- Effectively circulates knowledge and transfers skills throughout the company.
- Builds a sharing, trusting relationship between two people.
- Helps individuals move towards fulfilling their potential.
- Provides a valuable source of objective feedback.
- Promotes learning through dialogue.

Business Finance Magazine reports that 77% of companies credited mentoring with increasing employee retention and performance. Although there are few statistics on the financial impact of mentoring on business results, it is intuitive that the more satisfied employees are, the more productive and focused they are on the job as well as in the community and therefore influence outcomes more effectively. Mentoring can provide a real-time return on investment by helping to retain and grow our high potential employees.

How do you think mentoring can make a difference at Travelers?

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5
MENTORING
Overview

“Companies today need employees with quick minds, unique ideas, and the physical energy to put them together.”
~Connie Podesta and Jean Gatz

Benefits of Mentoring
To the Mentee

Mentees value the experience, insight and exposure that mentors offer. Some other benefits to the mentee are:

- Learning from someone with a different background and perspective.
- Learning about an area of the organization that the mentee has not yet been exposed to.
- Receiving feedback on strengths and developmental needs.
- Gaining knowledge, confidence and support to undertake new responsibilities and challenges.
- Supplementing constructive feedback obtained from the mentee’s supervisor.
- Getting an objective opinion from the mentor on how the mentee is perceived in the organization.
- Increasing his or her visibility within the organization.
- Receiving career development support.
- Developing a sense of professional identity and competence.
- Identifying career opportunities that would require years of networking to discover without a mentor.
Benefits of Mentoring
To the Mentor

The satisfaction from helping others is one of the benefits mentors receive from participating in a mentoring relationship. Other benefits include:

- Contributing to organizational and professional betterment.
- Gaining another perspective on company culture and attitudes.
- Hearing fresh ideas and enthusiasm from mentees.
- Satisfaction of helping people bypass some of the obstacles you overcame the hard way.
- Having an objective sounding board to talk to about projects or issues.
- Learning from the mentees.
- Learning from teaching others.
## Prework Review
### What Do I Need a Mentor For?
Discuss the following questions with a partner. Identify expectations that are common to both of you.

<table>
<thead>
<tr>
<th>Question</th>
<th>Response</th>
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<tbody>
<tr>
<td>1. List the expectations of your mentoring partnership:</td>
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<td>2. What are the specific expectations you have of your mentor?</td>
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<td>3. What are goals you would like to achieve as a result of participating</td>
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<td>in this mentoring partnership?</td>
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**Share your experience with mentoring with the group.**

Reflect on any experiences you have had with mentors in your life, or a current mentoring relationship. Specifically identify what has worked well and what has not worked well.

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<th>Reflection</th>
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<thead>
<tr>
<th>Roles &amp; Responsibilities</th>
<th>Mentors</th>
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</table>
| **Business Expert**      | - Expert in articulating the company's mission, vision, and values.  
                          - Understands how the matrix business structure and processes support growth, profitability, increased market share and how these elements impact shareholder value.  
                          - Clarifies and communicates organizational goals and objectives and how the mentee can influence and participate in them.  
                          - Knows or anticipates market trends.  
                          - Understands the customer. |
| **Counselor**            | - Works with the mentee to identify and understand career-related skills, interests and goals.  
                          - Assists the mentee in making short-term career decisions that match stretch career goals.  
                          - Listens and problem solves with the mentee. |
| **Coach**                | - Reinforces the achievement of business results and the leadership qualities and actions important for positive business results.  
                          - Recommends qualities that need improvement and strategies for further development.  
                          - Provides career direction for short-term job assignments and long-term career planning.  
                          - Identifies resources to assist mentee with specific problems. |
| **Advisor**              | - Understands formal and informal organization networks and provides advice to build additional relationships.  
                          - Guides the mentee in developing organization savvy and business maturity. |
| **Broker**               | - Expands the mentee's network through professional introductions.  
                          - Brings together mentee's peers who might mutually benefit from knowing each other.  
                          - Links mentee with professional development resources to build internal and external networks.  
                          - Opens doors to employment opportunities or visible project work. |
| **Advocate**             | - Intervenes on the mentee's behalf and represents his or her concerns on the specific issues within his/her peer group.  
                          - Arranges for mentee to be visible within and outside the organization (e.g. professional associations, Boards, Jaycees, Toast Masters, etc.). |
| **Responsibilities**     | - Make all attempts to maintain meeting schedules.  
                          - Provide developmental advice and guidance.  
                          - Celebrate milestones and developmental achievements.  
                          - Provide open, honest insights when providing developmental feedback.  
                          - Introduce mentee to others within the organization. |
# Roles & Responsibilities

## Mentee

<table>
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<tr>
<th>Role</th>
<th>Responsibilities</th>
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| **Student**   | - Assesses his/her individual needs openly and candidly; shares insights with his/her mentor and seeks feedback.  
                - Learns the organization (processes/structures, customers) and applies that knowledge day-to-day.  
                - Focuses on developing the knowledge and skills to better contribute to the current job assignment.  
                - Focuses on the skills and knowledge needed for the next job assignment.                      |
| **Risk Taker**| - Stretches his/her aptitude; uses courage to take risks.  
                - Increases capacity to contribute as a result of being coached.  
                - Is open to change and challenging him/herself and others to reach higher levels of success.  
                - Volunteers for projects and stretch assignments that may have high visibility.               |
| **Leader**    | - Contributes to community events demonstrating leadership abilities outside of Travelers.            
                - Aligns professional goals to department and company goals.                                     
                - Dedicated to becoming a leader at Travelers.                                                    
                - Demonstrates accountability; admits mistakes.                                                 
                - Influences without authority.                                                                  |
| **Relationship Manager** | - Establishes the agreement.                                                                 |
|                | - Schedules meetings; follows-up on canceled plans.                                                 |
|                | - Constructs and uses the action plan.                                                              |
| **Responsibilities** | - Takes the initiative in skill development and shares progress.                                    
                | - Is proactive and accountable to his/her career development.                                     
                | - Actively participates in the mentoring relationship.                                               
                | - Accepts and follows through on the mentor’s advice; open to constructive feedback.               
                | - Employs the rules of confidentiality.                                                             |
MENTORING AGREEMENT

Why is a mentoring agreement important?

A mentoring agreement helps clarify the expectations of both the mentor and the mentee. The agreement completed at the beginning of the mentoring partnership establishes a foundation from which to build. Having this discussion upfront may prevent misconceptions or other problems associated with establishing a new partnership. It is also a great way to start the partnership in a more formalized, yet collaborative manner.

You, as the mentee, own the agreement. By creating this agreement, you take ownership for your own expectations, goals and focus of the relationship. During the first meeting, the mentor and mentee should refine the agreement together creating a shared ownership and accountability of the partnership. Both parties should hold a copy of this agreement and be equally accountable for maintaining it.

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<thead>
<tr>
<th>Mentoring Agreement</th>
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<tbody>
<tr>
<td>Date:</td>
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<td>Mentor Name:</td>
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<td>Contact Information:</td>
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<td>Expectations of the Mentoring Partnership:</td>
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<td>Mentee Goals:</td>
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<td>Meeting Schedule:</td>
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<td>Additional Agreements:</td>
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**Exercise**  
**Developing a Mentoring Plan**

Complete the following questions in support of your Mentoring Agreement and Meeting Action Plan.

<table>
<thead>
<tr>
<th>Question</th>
<th>Answer</th>
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<tr>
<td><strong>What do I need to accomplish in the next 12 months?</strong></td>
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<td><strong>What could I work with my mentor on to add value to my current job assignment?</strong></td>
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<td><strong>What could I work with my mentor on that will help me increase business knowledge?</strong></td>
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<td><strong>What can I work on with my mentor to build my leadership capabilities?</strong></td>
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<tr>
<td><strong>How can my mentor help me in achieving my career goals?</strong></td>
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### Meeting Framework

**Areas of Discussion**

| **Business Knowledge**                  | ▪ Strategy, mission, vision and organization structure.  
|                                       | ▪ Legislative/regulatory requirements of the industry.  
|                                       | ▪ Customers and their requirements.  
|                                       | ▪ Current competitor trends best practices.  
|                                       | ▪ Issues that affect the insurance industry (customer trends, global expansion.  
|                                       | ▪ Marketing and brand strategies.  
|                                       | ▪ Financial results and how achieved.  
|                                       | ▪ Building shareholder value.  
| **Organization Savvy**                 | ▪ Understanding corporate culture.  
|                                       | ▪ Identifying boundaries and politics.  
|                                       | ▪ Building leverage with networks.  
|                                       | ▪ Getting things accomplished within a matrix environment.  
|                                       | ▪ Navigating organization networks and “unwritten rules.”  
|                                       | ▪ Building relationships with executives and the mentee’s boss.  
| **Personal Style**                    | ▪ Decision making style and processes applied.  
|                                       | ▪ Problem solving skills.  
|                                       | ▪ Leveraging networks with authenticity.  
|                                       | ▪ Developing personal savvy – when to lead, when to follow.  
|                                       | ▪ Influencing without authority.  
| **Communication Skills**              | ▪ Making presentations.  
|                                       | ▪ Fostering dialogue.  
|                                       | ▪ Empathetic listening.  
| **Professional Development**          | ▪ Professional and Career Development.  
|                                       | ▪ Future job assignments.  
|                                       | ▪ Outside activities.  
|                                       | ▪ Professional development associations.  
|                                       | ▪ Community service.  
|                                       | ▪ Professional publications.  
| **Leadership Development**            | ▪ Managing people and projects.  
|                                       | ▪ Leading and participating on project teams.  

| **Education Methods**                  | Suggested methods for learning the above in conjunction with the mentor’s coaching may include:  
|                                       | ▪ On-line course.  
|                                       | ▪ College courses.  
|                                       | ▪ Relevant readings.  
|                                       | ▪ Job shadowing.  
|                                       | ▪ Structured on-the-job learning.  

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*Based on the work of Dr. Norman Cohen, author of “The Manager’s Pocket Guide to Effective Mentoring”*
Mentoring Meeting
Additional Topics

After the initial meeting, and as the mentoring relationship begins to form, some suggested topics for discussion at future meetings are:

- Business problems/resolutions
- Current issues affecting Travelers and insurance/financial services industry
- Current issues/financial results in the mentor’s/mentee’s area
- Factors contributing to success
- Future job opportunities
- General career planning
- Industry publications
- Job responsibilities of mentor/mentee
- Mentor/mentee expectations
- People management skills
- Prior work experience of mentor/mentee
- Recent performance appraisals
- Review of various management reports
- Structure/focus of mentor’s/mentee’s department
- Travelers’ culture
  - Travelers’ organization
Mentoring Meeting
Action Plan

The Mentoring Meeting Action Plan integrates the monthly meeting agenda (yellow) with a plan to track agreements, support required, and future agenda items. (green)

<table>
<thead>
<tr>
<th>Mentoring Meeting Action Plan</th>
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<tbody>
<tr>
<td>Meeting Date:</td>
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<tr>
<td>Mentor Name:</td>
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<tr>
<td>Meeting Agenda</td>
</tr>
<tr>
<td>Actions and Agreements (Specific Steps)</td>
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<tr>
<td>Mentor Support Required</td>
</tr>
<tr>
<td>Topics for Future Reference</td>
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</tbody>
</table>
Case Discussions

A. Your mentor is a very busy leader. He has broad responsibilities, a number of direct reports, and a lot of influence in the organization. While you would love to be able to learn from your mentor, he has a hard time finding time for your meetings.

B. You have had a few meetings with your assigned mentor. It is very hard to get a sense of how the relationship is going. In each of the meetings, she has been interrupted by a page, a call, or a critical business issue. Your assumption so far is that the relationship does not seem to be working. You are thinking she does not truly want to be a mentor in the first place and are considering canceling your next scheduled meeting.

C. You have had your initial meeting with your mentor and it went ok. While you respect your mentor’s role and organizational knowledge, you find it hard to find common ground or subjects that interest both of you. You are running out of things to say!

D. You are preparing for your first meeting with your mentor. Your mentor is from a part of the business you know nothing about and you are anxious about looking prepared at your initial session.

Answer the following questions with your assigned team:

1. What is going on in the case?

2. What actions would you take immediately?

3. What actions or cautions would you consider going forward?
Mutual Accountability
A Shared Commitment

Showing up on time, focusing on the present as well as future commitments and reporting on results are all facets of commitment. Most mentoring experiences start with great intentions, high energy and enthusiasm for the new relationship. Many, however, fizzle out with not near the spark as first established. To avoid this, both you and your mentor must be accountable and committed to the objectives of mentoring.

Accountability can be described as the compass of the mentoring relationship. With it, you stay the course in the right direction, without it there can be a loss of focus on development goals and expectations.

When practicing accountability, communicate your intentions, what you need to achieve your goals and the deadlines you committed to. A quick framework to practice accountability involves:

- State your intentions – using the partnership plan, write down and discuss the intended actions and accomplishments to obtain the results.
- Establish a deadline or milestone date and time to complete the action.
- Maintain scheduled meeting times to follow up on.
- Accountability within the relationship may be defined as:
  - Develop a positive, take charge approach to achieving goals agreed to.
  - Tackle proposed stretch assignments and challenges, take risks.
  - Eliminate excuses; be straight with your mentor.
  - Establish measurable actions and deliverables.
  - Be honest, if you can’t deliver on your promises, openly discuss it.
  - Discuss how the process can be improved.
Exercise
Creating your Meeting Agenda

Take a moment to prepare your next mentoring meeting agenda based on what you have learned in today’s workshop. Be prepared to share your agenda with the rest of the group.

<table>
<thead>
<tr>
<th>Mentor Name:</th>
<th>Mentee Name:</th>
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<tbody>
<tr>
<td>Meeting Date:</td>
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Meeting Goals and Agenda:
A lot of people have gone further than they thought they could because someone else thought they could. ~ Unknown

Mentoring is an exciting, vital part of leadership development at Travelers. As a mentee, you have the opportunity to affect your own professional successes by fully participating in the mentoring partnership, contribute above and beyond expectations and relentlessly work on building your leadership ability.
PANEL DISCUSSION ON MENTORING

Questions:

Key Points:

To Do: