



Hong Kong Institute of  
**Certified Public Accountants**  
香港會計師公會



Tamty McGill Consultants International Limited  
泰田、麥基爾國際顧問有限公司

# **Hong Kong Institute of Certified Public Accountants**

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## **Mentor-Mentee Orientation**

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**2015**



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## Workshop Objectives

- Build up mentoring relationships between mentors and mentees
- Understand the structure of mentorship
- Understand the roles and responsibilities of mentor and mentee



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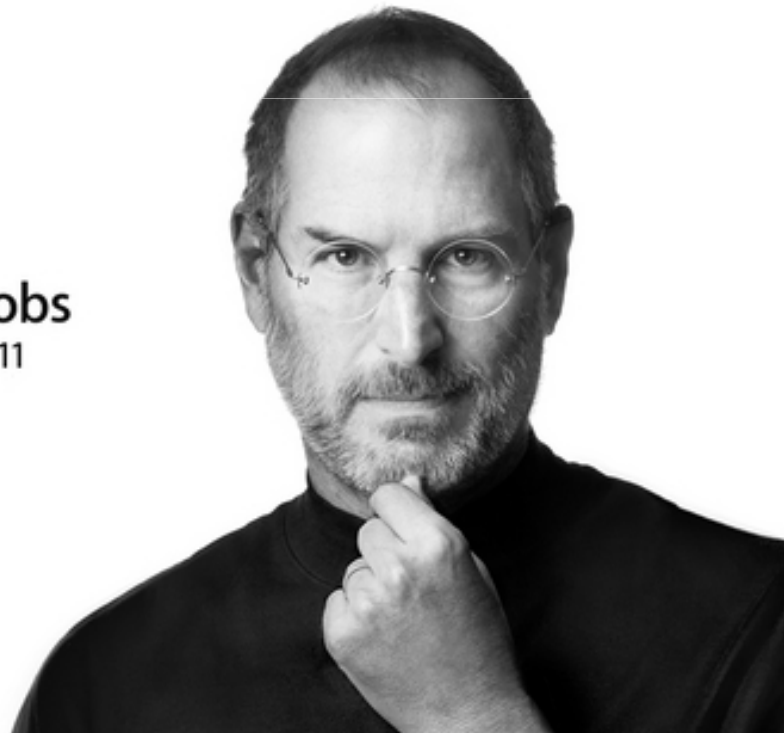
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# Introduction to Mentorship



# “Stay Hungry, Stay Foolish”

Steve Jobs  
1955-2011





## What is Mentoring?

- Mentoring is a relationship and a set of process where mentor offers help, guidance, advice and support to facilitate the learning or development of mentee.





## Roles and Responsibilities of a Mentor

- Provide empathy and support for career development
- Advise mentees on identifying and resolving professional issues
- Provide a risk-free environment to discuss mistakes
- Respect the confidentiality of what discussed during mentorship
- Identify opportunities for mentees to gain exposure
- Provide important information and introductions
- Encourage long-term career planning and self-assessment
- Support, guide, and coach
- Serve as a positive and personal role model





## Common Mentor Roles

Mentoring takes many different forms, and some mentors play multiple roles. Here are three examples:

- “The Role Model”
- “The Guide”
- “The Coach”



## Common Mentor Roles – “The Role Model”

- Demonstrate and explain appropriate attitudes, behaviours, and responses
- Model effective behaviour in professional life
- Support and encourage mentees’ continuous development



## Common Mentor Roles – “The Guide”

- Serves as an advisor and counsellor by sharing professional experineece
- Share contacts who can help the mentees gain information on professional issues



## Common Mentor Roles – “The Coach”

- Offer successful stories, and opinions about career
- Provide counsel on values, integrity, and ethical conduct
- Help the mentees recognise the likely outcome of his/her plans, actions, and behaviour



## Mentors' Dos and Don'ts

### Dos:

- Have the mentee's best interests in mind
- Provide non-judgmental support
- Provide guidance on issues raised
- Pass on knowledge and experience but encourage the mentee to be self-reliant
- Help develop learning plans
- Be a good listener and appreciate mentee's point of view
- Inspire mentee to meet or exceed his/her chosen goals



## Mentors' Dos and Don'ts

### Dos:

- Provide honest feedback
- Follow through on commitments
- Be respectful, responsive and committed
- Trustworthy – the issues discussed during a mentoring session should be treated in strictest of confidence
- Show passion for the accounting profession
- Be a role model of an accounting professional with high standard of integrity and professionalism



## Mentors' Dos and Don'ts

### Don'ts:

- Act as a sponsor
- Find job for the mentee
- Be an expert in all areas
- Carry out a mentee's work on his/her behalf



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# Key Factors of Mentorship





# Mentoring Dialogue/Conversation

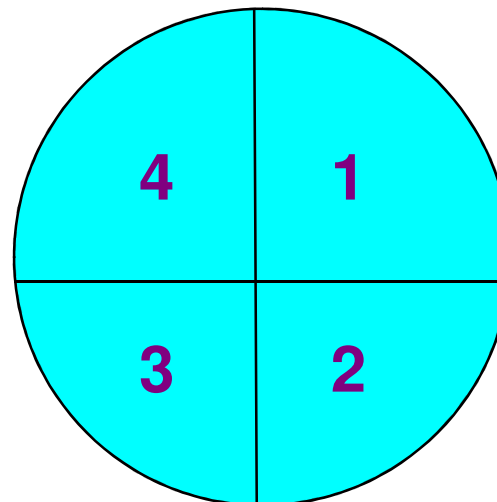
## Current Reality

“How am I doing?”

“Where am I now?”

Action

Reflection



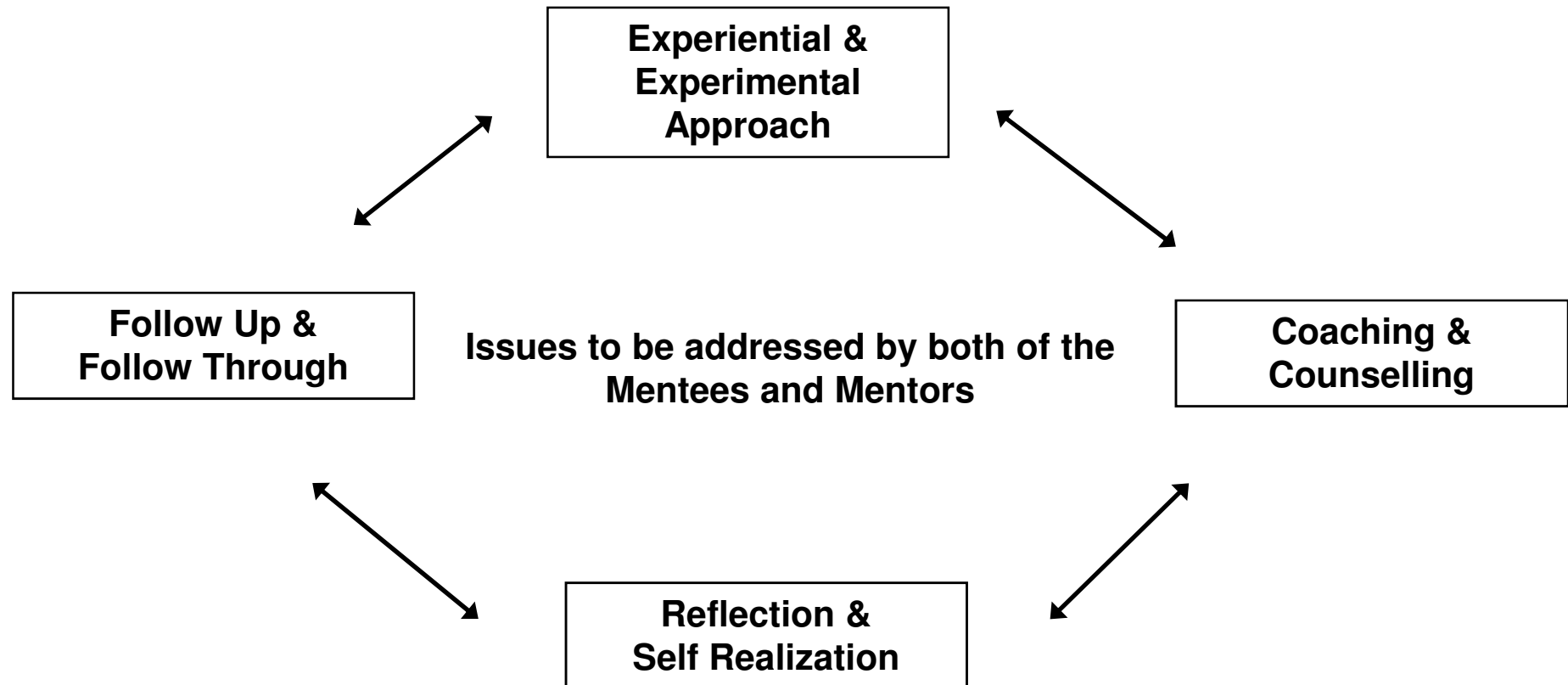
“How do I get there?”

“Where do I want to be?”

## Informed Decisions

# How to Mentor?

## Mentoring Formula: 2Es + 2Cs + 2Rs + 2Fs





## 6 Steps for Mentoring Process

1. Establish purpose of the discussion and its importance
2. Discuss and clarify details about the situation / issue
3. Agree on what needs to be accomplished
4. Discuss alternatives for achieving success
5. Seek agreement on specific action(s) to be taken
6. Express confidence and set a follow-up date



## Build Up Trust ---- 4C Model

### Four factors for trust building

- **Care**
  - Understand the mentee's needs and interests
- **Competence**
  - The ability to guide the mentee knows more about himself
- **Consistency**
  - Consistent attitude and make the promise
- **Confidentiality**
  - Keep the conversations confidential



## Toolkit for Mentoring Dialogue: F.R.A.M.E.

Process	Action	Question
<u>F</u> ocus	Pick and focus on the issue	“What should we focus on?”
<u>R</u> eveal	Articulate and examine viewpoints and assumptions	“How do we interpret the issues and best understand them?”
<u>A</u> ffirm	Convey a point of view and draw conclusions	“What have we learned together?”
<u>M</u> obilize	Agree on a course of action	“What steps need to be taken and where to next?”
<u>E</u> valuate	Agree on a time frame and process for review	“How do we sustain the momentum we’ve started?”



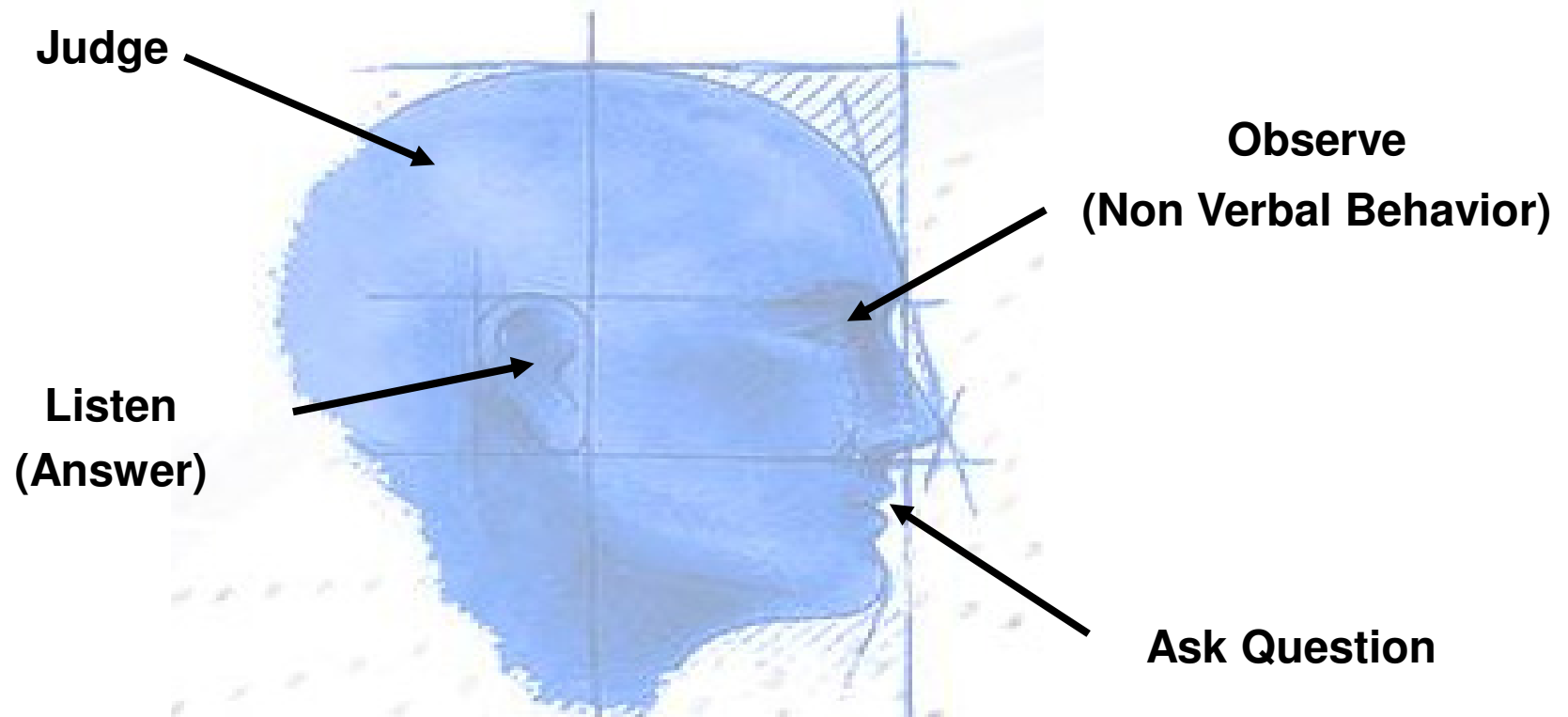
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# Sustaining Engagement through Successful Communication

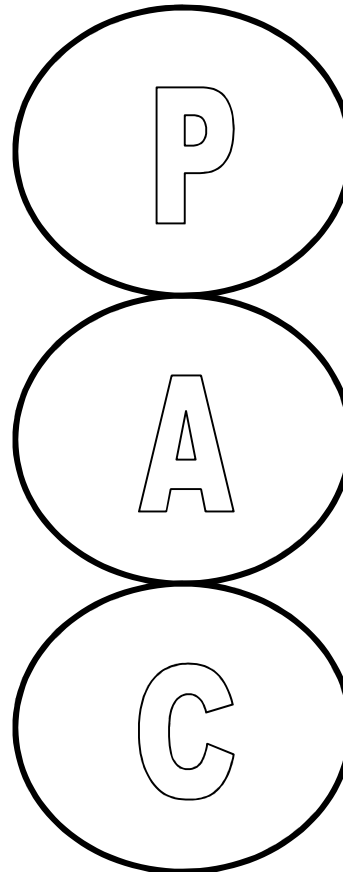
# Building and Maintaining the Mentor-Mentee Relationship





# Transactional Analysis

**The three ego-states  
that exist in each  
person**



**Parent**

**Adult**

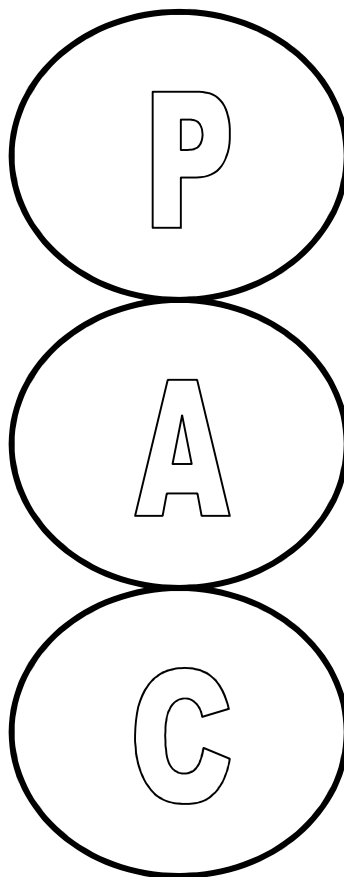
**Child**





# Transactional Analysis

## Example



**I should**

**“I should not eat so much.”**

**I believe**

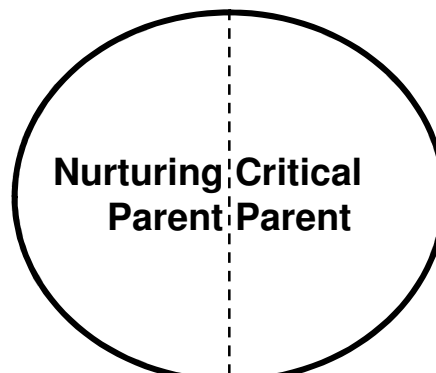
**“Eating too much oil is not good for health.”**

**I think, I like**

**“I like to eat.”**

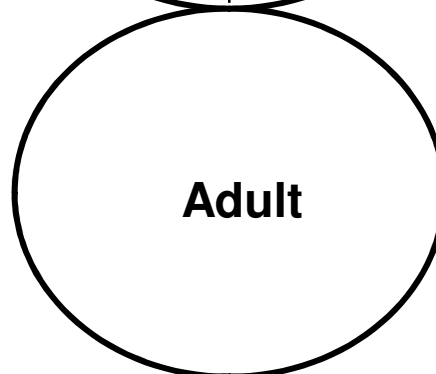
# Transactional Analysis

- Caring
- Nurturing
- Supportive



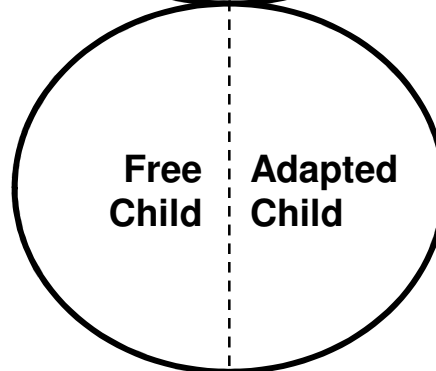
- Controlling
- Punishing
- Judgemental

- Thinking
- Objective
- Rational



- Analysing
- Decision-making

- Feeling
- Creative
- Intuitive



Compliant  
Child

- Calculating
- Comprising
- Obedient

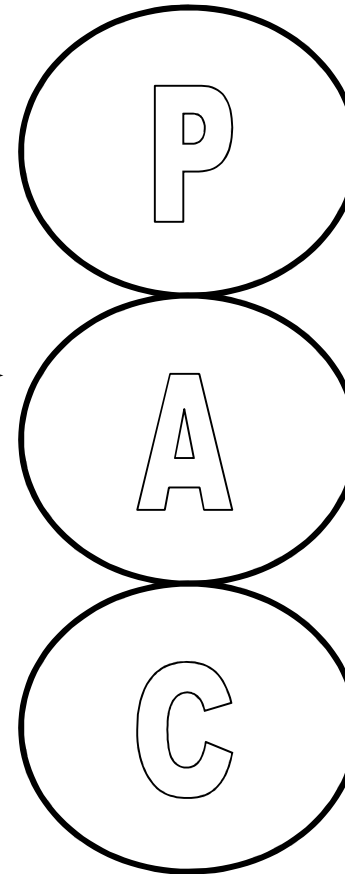
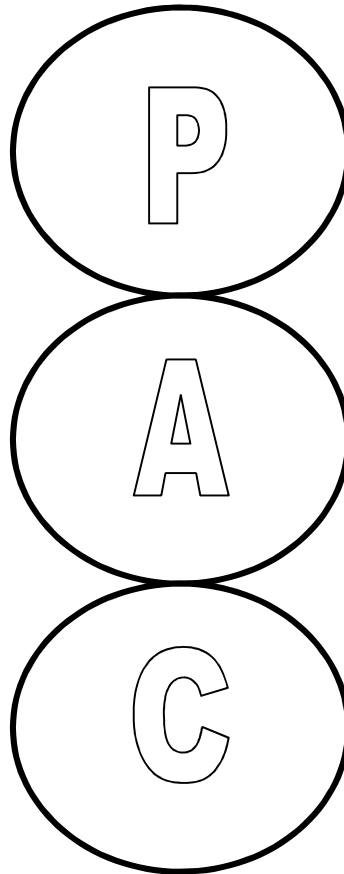
Rebellious  
Child

- Manipulative
- Rebellious
- Protesting

# Transactional Analysis

Situation 1

A

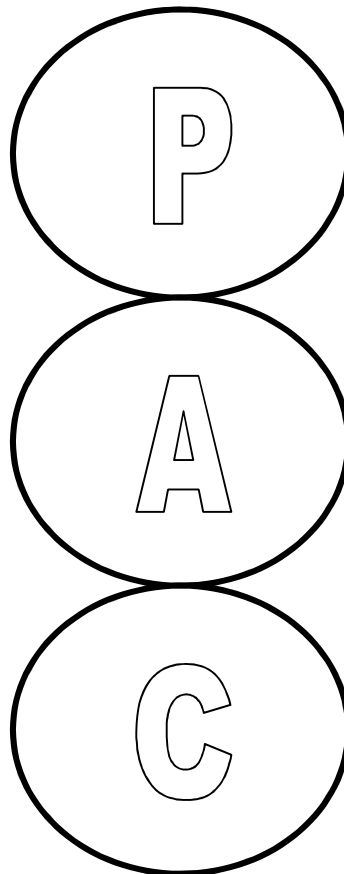


B

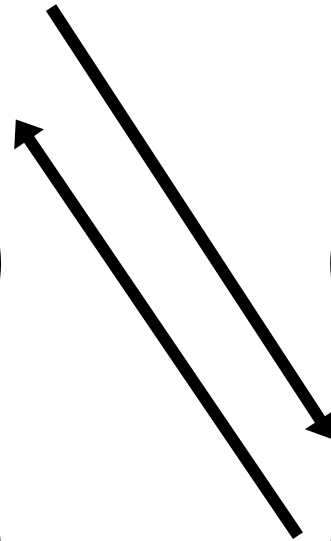
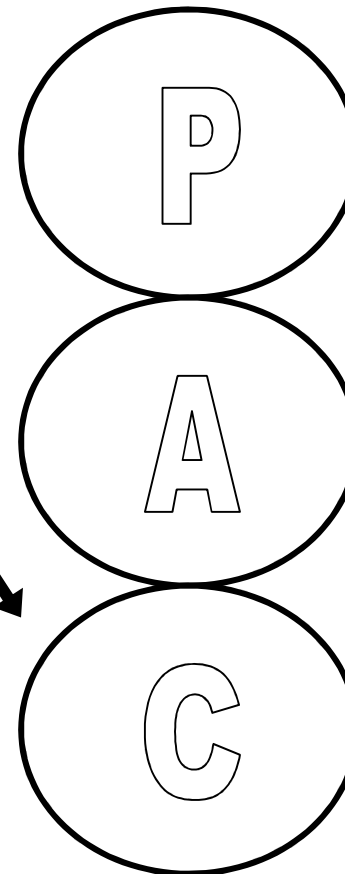
# Transactional Analysis

Situation 2

**A**



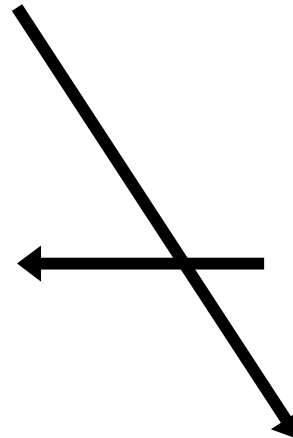
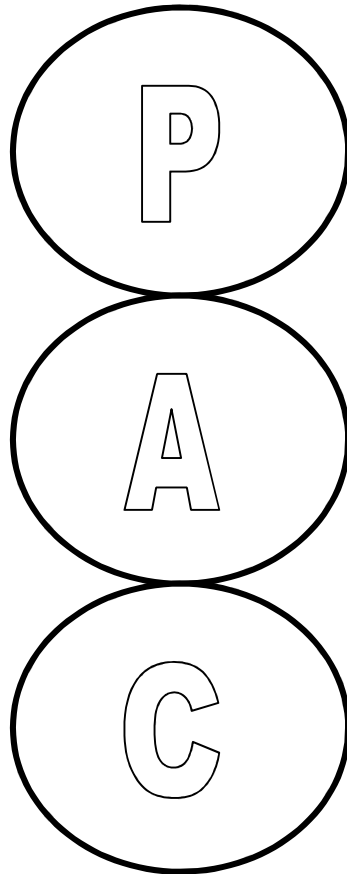
**B**



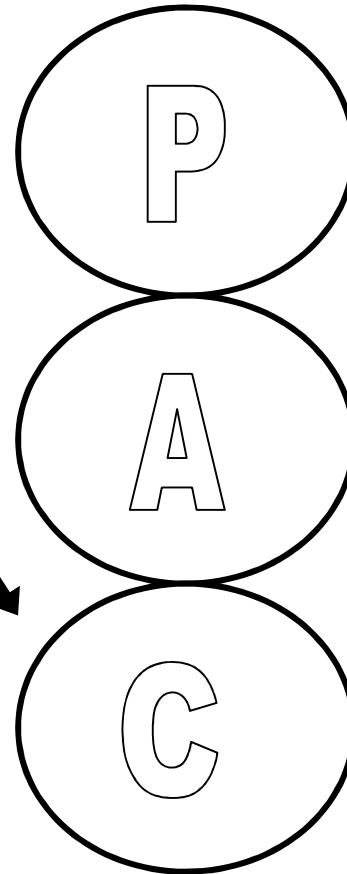
# Transactional Analysis

Situation 3

**A**



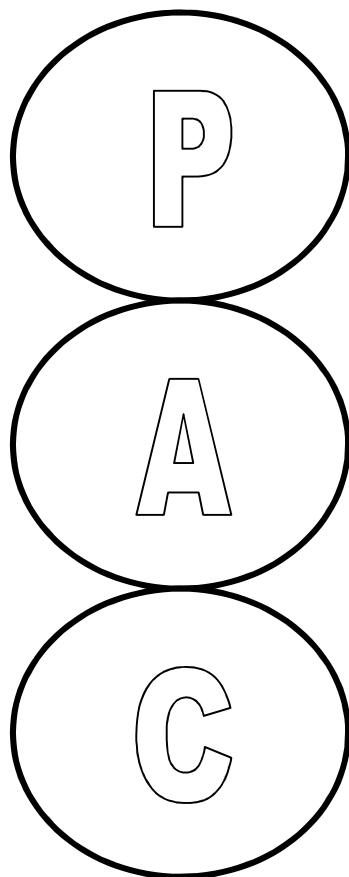
**B**



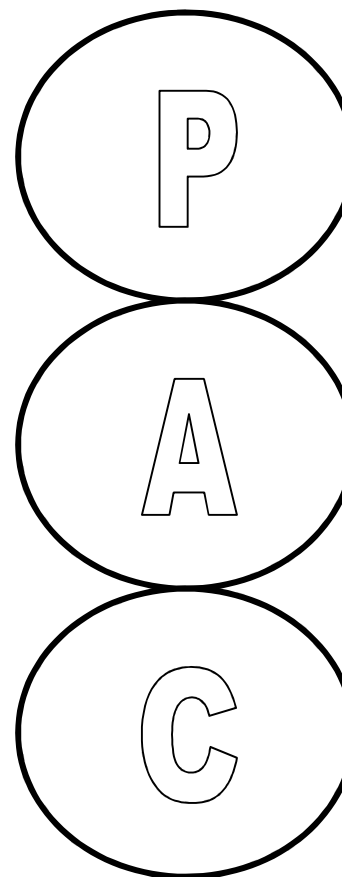
# Transactional Analysis

Situation 4

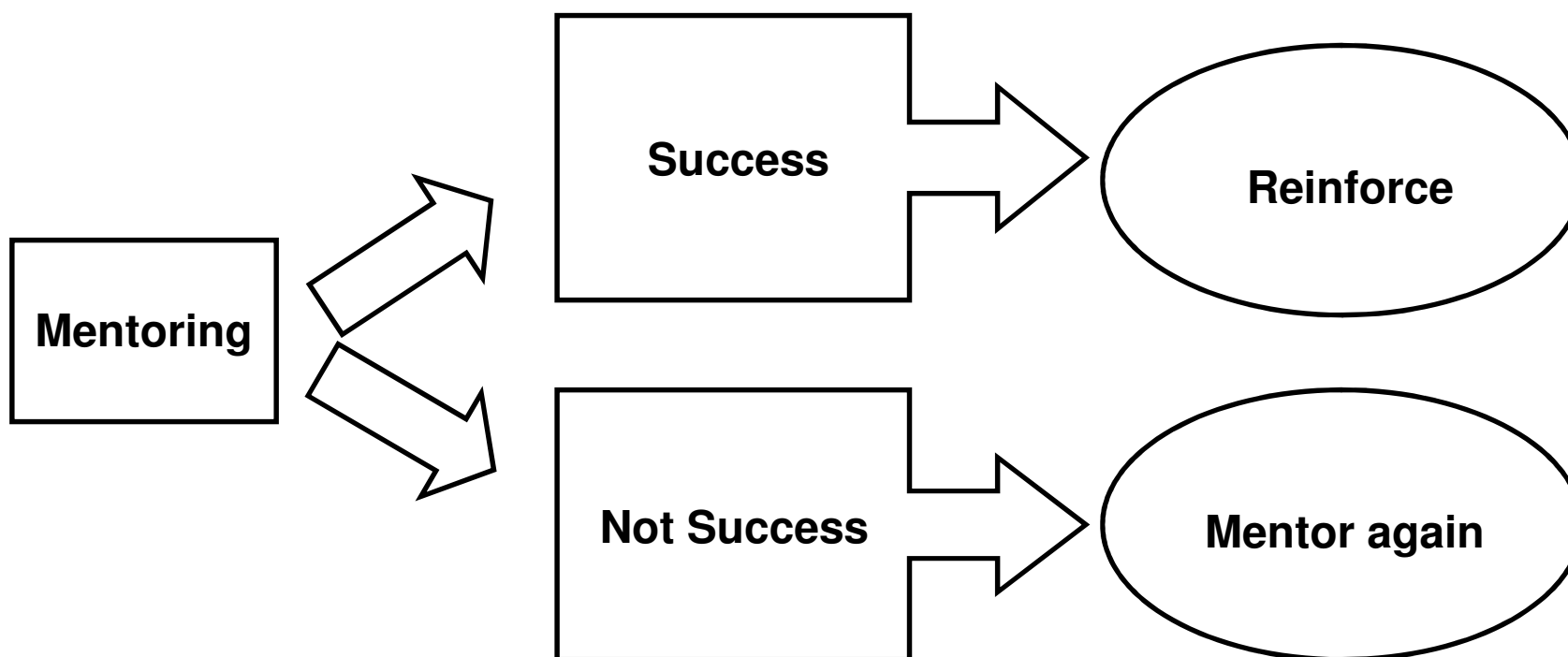
**A**



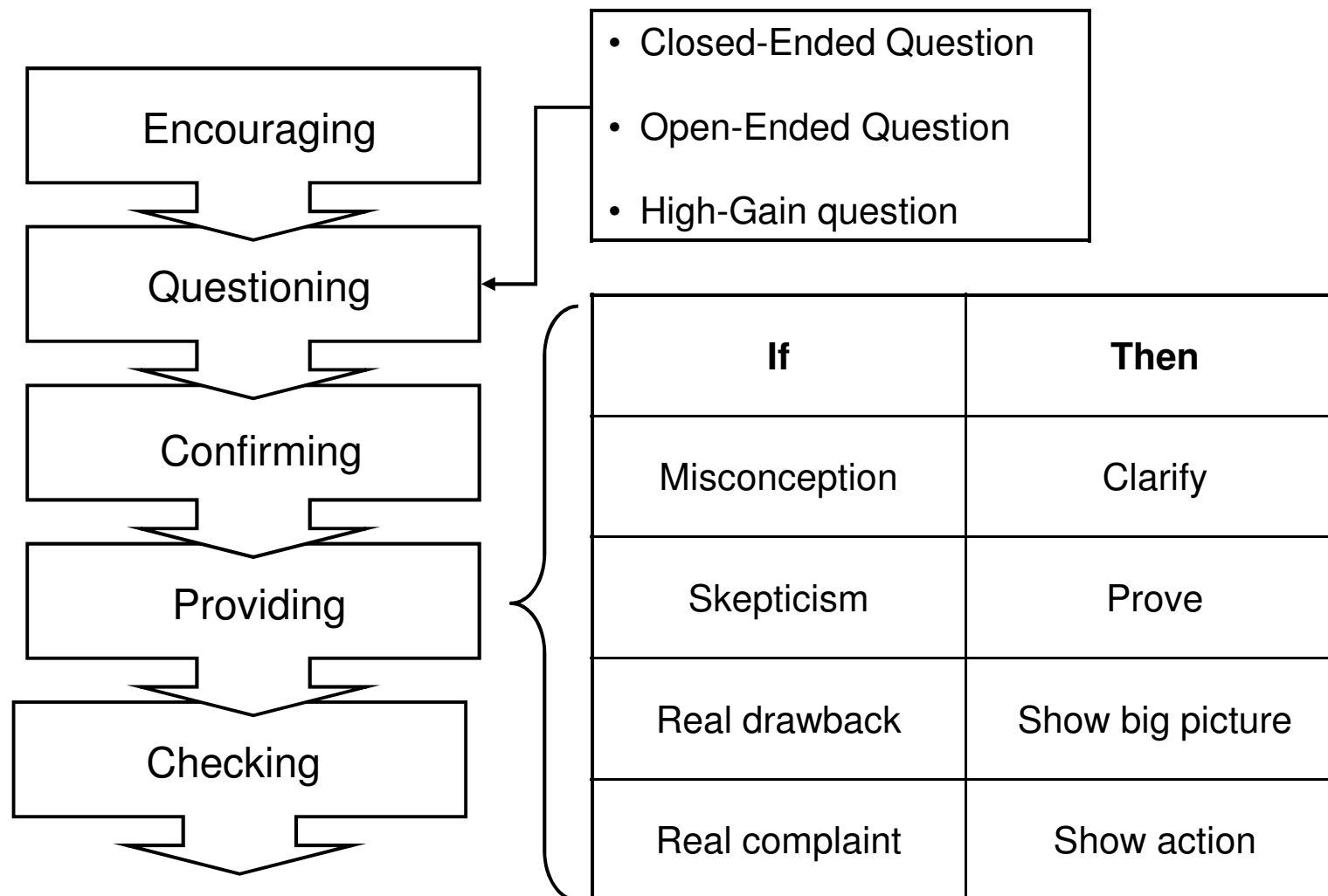
**B**



## Mentoring Follow-up



# Handling Objection / Disagreement







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# Introduction to Mentorship (Con't)



## Roles of a Mentee

- Have clear objectives of what he/she expects to achieve by participating in this programme
- Ensure that his/her objectives are discussed and agreed with his/her mentor at the outset of the mentorship relationship
- Determine the amount of help and guidance needed



## Responsibilities of a Mentee

- Take initiative to build the relationship
- Willing to learn
- Able to accept feedback
- Willing to “stretch”
- Take the initiative to ask for help/advice including organizing meetings with mentor
- Prepare the goals and objectives you have for your career development



## Mentees' Dos and Don'ts

### Dos:

- Listen and respect the opportunities, limitations, and format of the relationship a mentor is able to provide. Always act with courtesy and respect.
- Be prepared to ask for specific guidance and advice. The more specific you can be, the easier it will be for your mentor to help you.
- Use active listening skills during discussions with your mentor. Take notes and ask questions at appropriate times.
- Take the initiative to ask for feedback.



## Mentees' Dos and Don'ts

### Dos:

- Demonstrate that you are open to hear new ideas and suggestions to bring out your best.
- Tell your mentor how you prefer to get feedback (e.g. direct or softened).  
Be gracious and don't get defensive.
- Return phone calls promptly and be on time with commitments or meetings. Do not extend the meeting time with your mentor unless it is with his/her consent.



## Mentees' Dos and Don'ts

### Dos:

- Seriously consider the advice or suggestions rendered by the mentor but you are accountable for your own decisions. Keep the mentor informed of the progress and express your appreciation even if you have not fully taken his/her advice.
- Assume the mentoring connection is strictly professional. Do not intrude into your mentor's personal life or expect to be close friends with your mentor. For a cross-gender connection, any romantic involvement is inappropriate.
- Keep confidentiality on matters discussed during the mentoring process.



## Mentees' Dos and Don'ts

### Don'ts:

- Look to the mentor for answers to all of your problems.
- Contact your mentor at unreasonable hours.
- Seek personal or career favours out of the relationship.



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# Your Career, Your Ownership

## Career Development Roadmap – On A Tandem







# How to Wrap Up the Mentorship Relationship at the End of the Cycle?



## Closure

- An end-of-term gathering, formally bringing closure to the mentoring connection, will be held in April 2016.
- The mentoring pairs can continue an informal relationship.
- Transition of mentoring relationship to at least one of the following form:
  - From Formal to Informal
  - Transition to Different Partner



## Closure: Transition of Mentoring Relationship

- From Formal to Informal:
  - If goals weren't achieved during the structured period or if new goals were identified, the mentoring pair should be encouraged to continue their relationship on an informal basis if that is what they each feel will be most beneficial.
- Transition to Different Partner:
  - Some mentees may wish to be mentored by someone in a different career field or feel there are no more benefits to be gained by remaining with the same mentor. This transition could be informal or it could be part of the next formal mentoring programme.



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# Individual Action Plan



# Individual Action Plan

	Improvement Objectives	Actions required
Area 1		1
		2
		3
Area 2		1
		2
		3
Area 3		1
		2
		3



# Individual Action Plan

	<b>Obstacles Anticipated</b>	<b>Help Needed? From Whom?</b>	<b>Benefit Expected</b>	<b>Review Date</b>
<b>Area 1</b>				
<b>Area 2</b>				
<b>Area 3</b>				



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