



Welcome to Mentoring!

Date

Hi,

Welcome to mentoring! This document is designed to get the process in motion and answer some questions you may not have asked yet. I have provided this letter in part because others in your life may like to know more about this journey you're starting, and in response you can send them this letter. If you're just far too busy to read or complete the questions below we can work through each of the documents in this package during our calls, but it just takes a little longer to do it that way.

The only thing we must do regularly is schedule times to talk, which we will do after each session. This package gets us going with the process of mentoring. I hope you will be able to complete all of the questions in the early stages of our getting to know one another. The more you do between calls the more we get accomplished during calls.

I'm looking forward to partnering with you to help you achieve what you are looking for in life. To begin this process, I'm sending you the following items, which are mostly contained in this document. Instructions and explanations are included with each.

- Agreement
- What to Talk About
- 10 Goals
- What Are You Tolerating?
- List of Thoughtful Questions
- Mentoring Call Prep Form
- Life Scan (attached)

Generally, I find it works best if we review the **Life Scan** on our first call together. After the Life Scan we will review the Birkman and then the Welcome Letter sections listed above. We can go through these documents as quickly or slowly as you like. I prefer that you complete the documents electronically and email them back to me before our calls so that we have the same document to review together. Please feel free to add any comments or additional information.

As you can see, I have a process that can operate as a framework for us to follow but with that in mind - you are free to change that in any way as we proceed. I look forward to working with you to reach *your* desired results and achieve *your* goals. If you have questions, call me at (604) 987-7531 or by email to dave@dphillips.com.

Warm regards,

Dave

AGREEMENT

The purpose of this agreement is to establish the expectations and boundaries of our relationship. It defines what my promises to you are and what your responsibilities are.

What I Promise You:

- To be present and available for you when you call at your scheduled time.
- To be unconditionally constructive and supportive at all times.
- To always speak the truth as I see it to you. You may not always agree with me and I count on you to tell when those times happen.
- To provide you with materials and supplies needed for our mentoring relationship.

Your Responsibilities:

- Be available at the time we agree to talk. I will usually call you unless you prefer to call me.
- Book for yourself some additional time for each appointment to write down what you are taking away from the call along with your action plan and email this to me as applicable.
- Honesty affects the quality of the mentoring environment. Please be honest with me at all times. What you say is confidential within the mentoring relationship. You can say anything to me, positive or negative. This includes being honest in your responses to me AND letting me know if something makes you uncomfortable or you don't want to respond to a question.
- If at any time our sessions are not matching your expectations please let me know.
- Everyone's a little different in his or her requirements to engage in a mentoring relationship. However, I find that most people like to do a "quick start up" (4-6 hour 1st session), then four one-hour sessions per month in the first 2-3 months. After that, people often reduce that to two 1-hour sessions per month. You decide! When you do I will instruct my assistant to invoice you near the end of each month. However, if you miss a call and don't make other arrangements a minimum of 24 hours in advance you'll be invoiced for it as I cannot book that time with someone else.
- For Hourly Mentoring the rate is \$600.00/hour. I also offer a Quarterly Retainer program where participants receive up to 4 – 1 hour sessions monthly and unlimited email support and telephone support for quick issues between calls. The investment for this program is \$8,000.00 USD quarterly. Birkman testing and interpretation is included.
- *If I ever say something that upsets you or doesn't feel right, bring it up.*

WHAT TO TALK ABOUT DURING SESSIONS

The mentoring relationship is unique because it is one of equals. It is different from almost all other relationships because I have no agenda for you or your life other than getting you to where you want to go. You are not reporting to me and are not accountable to me. You will also need to feel completely free to spend the entire time talking about your life. I'd be happy to answer any questions you have about my life, but please remember this relationship is about your life.

We have formed a partnership where you determine the agenda. It might help you, as we begin, to have some ideas of what you would like to talk about during our call. The following may serve as a guide for you. There are no limits to what to talk about on our calls. You are in control of the relationship.

In time we will narrow down our discussions to the most pressing issues and focus on moving forward in each of these areas. The following provides examples of some of the topics that are often discussed during calls.

How You Are

- How you are feeling about yourself (the good, the bad, and the ugly).
- How are you looking at your life?
- How are you feeling about others?

What Has Happened Since The Last Call?

- What has occurred to you since the last call?
- Any breakthroughs and/or insights?
- Any new choices or decisions made?
- Personal news

What Are You Working On?

- Progress report on your goals, projects and activities
- What you've done that you are proud of?
- What are you coming up against?

How I Can Help

- Where are you stuck?
- Where are you wondering about something?
- A plan of action?
- A strategy or advice?

What Is Next

- What is the next goal or project to take on?
- What is the next goal or distinction to identify?
- What do you want for yourself next?

GOALS FOR THE NEXT 180 DAYS

What are the goals you most want to set for yourself for the next 180 days? Select only those goals which you really want, not the ones you should, could, oughta or might want. Look deep inside and then begin to write down your 5 most important personal and/or professional goals. We can develop these further as we discuss them during our mentoring sessions. When you set the right goals for yourself, you feel excited, a little nervous, ready and willing to go for it!

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What are some of the personal and professional benefits to you of accomplishing these goals?

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WHAT ARE YOU TOLERATING?

We humans have learned how to tolerate a lot! We put up with, accept, take on and are dragged down by people's behavior, situations, unmet needs, crossed boundaries, incompletions, frustrations, problems and, even our own behavior. These 'tolerations' drain your energy!

You are tolerating more than you think. So, what are you tolerating? Take a couple of minutes to write down the stuff you sense you are tolerating. As you think of more items, add them to your list.

Do you have to do anything about them? Not really. Just becoming aware of, and articulating them will bring them to the forefront of your soul and you'll naturally start handling, eliminating, fixing, growing through and resolving these tolerations. (Enjoy this!)

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THOUGHTFUL QUESTIONS

1. What do I really need to know about you that will help me most in mentoring you?
2. What will be the first small thing that might happen to indicate the mentoring process is working?

3. How have you been motivated in the past to reach difficult goals, make difficult decisions, or do difficult things? How can we best utilize that motivator now?

4. What consumes your time that doesn't give you a wonderful present or future?

5. Where are you most irresponsible?

6. How will you know how effective our mentoring has been?

7. How will you sabotage our professional relationship?

8. How willing are you to make substantial changes?

CLIENT CALL – MENTORING PREP FORM

GET THE MOST OUT OF YOUR MENTORING CALL BY PREPARING FOR IT.

Each person will prepare for calls differently. The more prepared you are, the more productive our time is. I would recommend that you produce an agenda before each call and email it to me in advance. For example you could prepare an agenda by responding to each question below.

1. WHAT I HAVE ACCOMPLISHED SINCE OUR LAST CALL

2. WHAT I DIDN'T GET DONE AND HAD INTENDED TO

3. THE CHALLENGES AND PROBLEMS I AM FACING NOW

4. THE OPPORTUNITIES THAT ARE AVAILABLE TO ME RIGHT NOW

5. I WANT TO USE MY MENTOR DURING THE CALL TO ...

6. WHAT I PROMISE TO DO BY THE NEXT CALL

Take a moment to reward yourself for completing this package. You are taking some steps to invest in yourself and this investment will pay off not only for you but also for those around you. Well done!!