R.P. DELIO & CO.

Mentoring and Coaching

A METHODOLOGY FOR SUCCESS

R.P. Delio & Company is a leader in full-service consultancy on engineering, procurement, construction, and operations in the new industrial age. As a project delivery firm with a global grasp, we believe the challenge is in the planning, not the executing.

Our activities span the full spectrum of facility, technology and process design; by applying technology and innovation optimally to these, our vision is of helping to build a better world.

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INTRODUCTION

Mentoring and coaching are distinctive learning services that take a radically different approach to formal training courses and classwork. R. P. Delio & Company believe that breaking away from traditional models of learning can yield rich dividends for senior managers and executives. They provide for novel and beneficial outcomes, which lie outside the simple acquisition of specific skills or techniques. These include the potential to

> advance management paths to the next level

> turn-around failing projects

> truly transform individual careers

This means that in addition to our technical training programs, we provide mentoring and coaching services that allow for more personal, directed and insightful learning experiences — and which allow the client to explore and integrate new perspectives. We draw upon a network of mentors and coaches who provide profound perception from within their in-depth knowledge-bases.

Their areas of proficiency include:

> Corporate Strategy

> Project and Program Management

> Project and Program Financing

> Clean Energy Engineering and Development

> Operations, Procurement and Logistics Management

> Engineering Design and Process Engineering

We also see the value in breaking out of the silos of compartmentalized knowledge, and believe our most-experienced staff can provide their most penetrating insights, and radical learning experiences, when deployed across traditional corporate cultural boundaries.

In this white paper, we seek to define the roles of trainer, coach and mentor, both with respect to one another, and in relation to what they can deliver for a client of R. P. Delio & Company. We also detail the methodological approach we bring to the practice of mentoring and coaching — an integrated and grounded process that delivers (we believe) exceptional results.

OVERVIEW OF LEARNING APPROACHES

MAPPING THE LEARNING SPACE – TRAINING, COACHING AND MENTORING

Individuals who are seeking to grow in skill, technique and insight can draw on the resources of experts in a variety of ways – and through a range of learning relationships – depending on the learning goal in question. The learning space is defined (among other things) by the kind of knowledge transfer being targeted, the type of relationship occurring between the parties, and the length of that relationship. Training, coaching and mentoring occupy different parts of that learning space, and while there is naturally some overlap, the focus, duration, and nature of relationship evolve as the learner moves from student to mentee (see Figure 1).
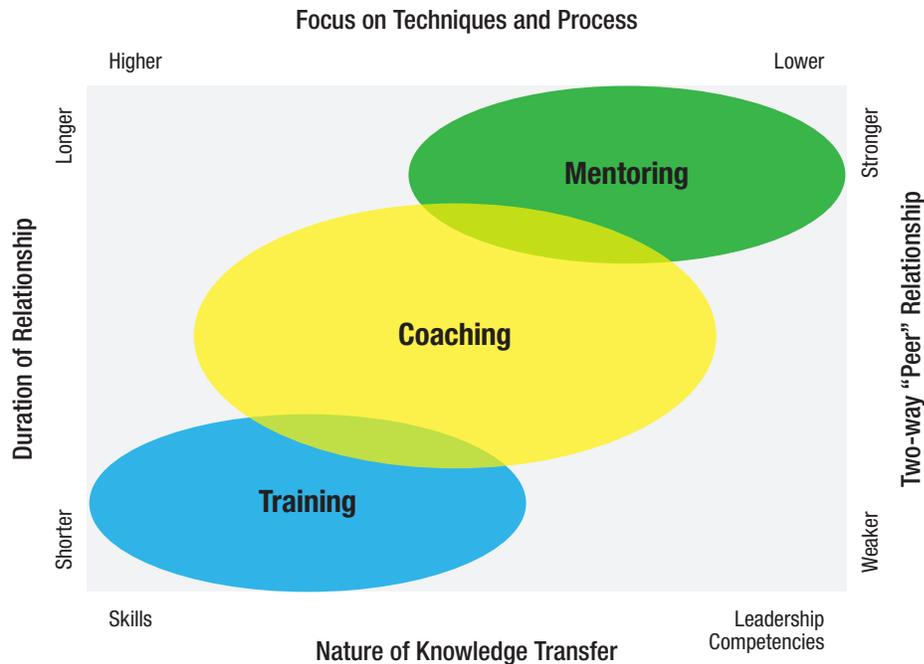
Focus on Techniques and Process

Figure 1: Overlapping features of mentoring, coaching & training

Training Defined: Training is a formal, brief, structured learning experience with tightly defined learning objectives. In general, the trainer is considered the expert, and there is a one-way flow of information from the instructor to the trainee. The knowledge being passed on is usually skills-orientated, with a strong emphasis on practical process.

Coaching Defined: Coaching is somewhat less formal than training, and of a longer (but still fixed) duration. But the learning experience is still bound by tightly-defined learning objectives, and involves the coach passing on knowledge to the coachee. Although the flow of information remains one-way – from the coach to the coachee – the relationship itself is more interactive, one-to-one, and much more intense. The knowledge being passed on remains skills-orientated, with a stronger emphasis on technique.

Mentoring Defined: Mentoring is the least formally structured form of learning, and involves a long-lasting and intense learning relationship. While the mentoring learning experience will often have one or more well-defined general goals, these revolve less around 'knowledge transfer'. Instead, the focus is on the building of the personal, social and cultural strengths needed to assist the mentee in achieving success in their workplace and wider career. Although the mentor is the primary instructor, the learning experience is encouraged to be a two-way, mutually enriching activity, that significantly boosts the benefits for both parties.

	Training	Coaching	Mentoring
Motivation (who should take this approach?)	Those seeking to provide staff with specific skills	Those seeking to develop staff for specific high-level competencies Those looking to assist staff not meeting expectations in specific areas Those wanting to gain specific managerial skills	Those seeking to develop leaders or a talent pool for succession planning Those looking to help senior staff overcome barriers preventing them from realizing full potential Those wanting trusted support, confidence and insight as they progress their careers
Expert Provision (who will provide service?)	Trainers are subject-matter experts, highly-qualified to impart specific skills to the learner	Coaches are professionals with recognized expertise relevant to the learner's goals, and a proven ability to direct learners towards self-improvement	Mentors are veteran professionals with abundant expertise and proven ability to add immense value to the learning experience
Approach (how will they help?)	By providing learners with the tools, knowledge and practical-based experience necessary to master the relevant skill	By enabling learners to advance their skills, and then assert control over their own learning, by applying intense coaching techniques	By acting as a catalyst for insight, self-growth and self-directed learning opportunities, supporting the holistic development of the learner, across personal, social and cultural facets
Learning environment (where will service be provided?)	Training takes place in suitably equipped facilities in the learner's workplace, or at our own selected training venues	Coaching takes place primarily in the learner's workplace, including quiet spaces to allow for confidential coaching	Mentoring takes place both in the learner's workplace, and in mutually agreed convenient meeting spaces for confidential reflection and discussion
Timing (when is it most appropriate?)	Training is useful to a learner whenever it is necessary to acquire a skill that is relevant to the learner's work role	Coaching is useful to a learner for developing a deeper knowledge and a more sophisticated understanding of existing and new approaches	Mentoring is useful to a learner at the career outset, when there is significant career change, or because of specific and significant challenges in the leaner's role, especially within the context of progress through senior management

Table 1: The who, how, where and when of training, coaching and mentoring – a comparison

FIVE DIFFERENCES BETWEEN MENTORING & COACHING

1. WORK ORIENTATION

Coaching is task-oriented. It is concerned with achieving improved ability in specific areas, such as:

> improving communication through more articulate speaking

> becoming more effective in managing

> thinking in a more coherently strategic fashion

The coach is the expert who will deliver the required improvement in these specific skills.

Mentoring is relationship-oriented. It is concerned with general issues surrounding personal development in a business or professional context, such as:

> discussing and improving work/life balance

> enhancing self-awareness, self-confidence, and self-perception

> how the personal influences the professional

> providing a safe environment for confiding and sharing issues related to professional success

The mentor is the expert who will engage in a dialogue to guide improvements in these areas.

2. DURATION

Coaching is short-term. The coach-coachee relationship involves the realization of defined objectives over short periods of time. The coaching continues for as long as is needed to successfully achieve those objectives, but is usually a matter of months at most.

Mentoring is long-term. The mentor-mentee relationship involves an long-term relationship, with an ongoing investment of time. Time is needed both to build a climate of trust, and to deepen understanding and constructive insight. The mentoring may need to continue for nine months, a year, or longer, in order to realize its goals.

3. DRIVE

Coaching drives improved performance. Coaching aims to significantly improve the performance of an individual in their job. This could be through the acquisition of new skills, or through enhancement of skills already acquired. Once the coachee has seen their performance measurably improve, the coach is no longer required.

Mentoring drives forward development. Mentoring aims to push forward the development of the individual, for their long-term career as well as their immediate position. This necessarily requires a clear division between line manager and mentor An individual's mentor needs to come from outside of existing reporting structures, so as to provide that wider developmental scope.

4. DESIGN

Coaching does need a tailored design. Coaching can be called upon quickly to address skill levels for a specific topic. Some planning and assessment may be needed where a large group requires coaching. But a suitably-qualified coach shouldn't need a long design phase to get the coaching program up-and-running.

Mentoring does need a tailored design. Mentoring needs a thorough assessment and a tailored design phase, in order assure a proper matching and alignment at the start of the process. That requires the determination of the overall strategic purpose, the areas of focus, the mentoring model to be follow, and the matching process for a properly aligned relationship.

5. MANAGEMENT RELATIONSHIP

Coaching requires the involvement of management. The immediate manager of the coachee is often a vital partner, providing the coach with the specific areas of focus for the coaching. This information is used by the coach to frame the coaching process

Mentoring requires separation from management. The immediate manager of the mentee should not be directly involved in the mentoring process. They may be involved indirectly, by offering advice during the design, or providing recommendations for the matching process. But it is essential that the manager has no direct link to the mentor, with no communication during the mentoring relationship. This is to ensure the relationship has complete independence and integrity for the mentee.

A trainer..	A coach..	A mentor..
Can relate instruction to evidence from theory, research and practice	Can relate instruction to evidence from theory, research and practice	Can relate guidance to evidence from theory, research and practice
Is able to pass-on skills to learners through both practical actions, instruction and guided exercises	Is able to build strengths for learners, through practical actions, informed advice and through guided conversation	Is able to build strengths for learners, through practical actions, informed advice, guided conversation and insightful exploration of roles
Is able to observe, analyze and reflect upon the learner's activities while under instruction, and feedback assistance throughout the process	Is able to observe, analyze and reflect upon the learner's professional practice and to communicate this to the learner	Is able to observe, analyze and reflect upon the learner's professional practice and to discuss this, and its wider import, with the learner
Can provide timely and relevant feedback to enable learner to gain from mistakes as well as successes, within the skill being taught	Can provide timely and relevant feedback to enable learner to gain from mistakes as well as successes, within the context of the area being coached	Can provide timely and relevant feedback to enable learner to gain from mistakes as well as successes, across all facets, including personal, social and cultural
	Is able to build trust and confidence by being sensitive to learner's needs and goals	Is able to build trust and confidence by being sensitive to learner's needs and goals
	Can tailor learning activities to maximize the benefits of realizing the goals of the learner	Can provide access to a diversity of opportunities and approaches for realizing the goals of the learner
	Can use techniques of open questioning: to help explore beliefs, raise awareness, develop plans, explore and commit to solutions, and understand consequences	Can use techniques of open questioning: to help explore beliefs, raise awareness, develop plans, explore and commit to solutions, and understand consequences
	Can use techniques of active listening: > to accommodate and value silence, to concentrate on what is being said (while explicitly signaling attention) > and then to reinforce, value and re-frame speaker's thoughts through repetition	Can use techniques of active listening: > to accommodate and value silence, to concentrate on what is being said (while explicitly signaling attention) > and then to reinforce, value and re-frame speaker's thoughts through repetition
	Is able to facilitate access to the research and evidence needed to support ongoing realization of learner's goals	Is able to build a framework for self-directed learning for the learner, in parallel to mentor-mentee relationship
	Will establish buffer zones between coaching relationship and any other formal relationships	Will place the mentor relationship outside of existing formal relationships
		Is able to act the role of sympathetic and trusted confidant for the learner, so they can express concerns, discuss problems and explore insights outside of workplace constraints

Table 2: The skills needed for trainer, coach and mentor

RELATIONSHIP STYLES FOR COACHING

There are a range of approaches that can be taken by a coach, each of which has merits within the specific context it is being used. R. P. Delio & Company don't rigidly hold to one particular style as being superior to another, but instead adopt a 'best-fit' strategy as part of the design of our alignment process.

> **Socratic Approach:** the coach plays the role of a catalyst for insight. This involves structured questioning to clarify meaning, to probe assumptions, and to investigate and explore the learner's rationale. By rigorous navigation of the unspoken context of issues, hidden meaning and insights can be revealed.

> **Demonstrative Approach:** the coach leads the way through positive demonstration. This involves them taking a practical progression through a problem, leading it towards a solution for the learner. But critically it allows for the learner to shadow the actions, and decide when (and to justify why) to take a different course of action.

> **Interventionist Approach:** the coach observes and then intervenes. This involves the learner taking the lead in stepping progressively through a problem, without feedback. By focusing on observation of practice the coach/mentor can gain insight – and then judge when to offer useful intervention, to push back towards a successful resolution of a problem.

> **Guiding Approach:** the coach acts as a guide rail, providing continuous feedback. This involves the use of active learner action interleaved with 'live' coach/mentor feedback. By applying constant assistance, corrected user actions are reinforced and the path of action guided gradually towards success.

DESIGNING THE MENTORING PROCESS

Each of our mentoring programs follows a well-defined and step-wise process of design. This is to ensure that the program is the best possible fit to our client's expectations. The program must fully takes into account the distinct personalities, situations, objectives and resources peculiar to each mentoring relationship.

1. EXPECTATIONS SETTING & ALIGNMENT

Before a mentoring program can be designed in detail, expectations must be understood, and shaped, so that the goals of the program are properly aligned within the client's organization (if applicable). Only then can optimum results be delivered for the individuals and organizations undertaking the service.

Where a mentoring program is being initiated within an organization, it is essential that a proper business case for the service is developed. This is needed to generate stakeholder support, and to promote an understanding of what mentoring will involve – both for the individuals being mentored, as well as the organization as a whole.

In addition to the detailing of the overall program expectations, the business case will include (at minimum) assessments of:

> critical success factors

> stakeholder engagement strategies

> change management procedures

> project evaluation methods and metrics

> dependencies on other projects,

2. AREAS OF FOCUS

Once the overall program expectations are set, and the business case has been set out, the detailed objectives – and the areas of focus – must be defined. This requires the fleshing-out of the overall expectations with those specific topic areas that require mentoring assistance. This will require a proper assessment of the client's existing processes and personnel, so as to better inform the design of the mentoring program, and the relative priority of the identified areas of focus.

3. LEARNING RESOURCES

A mentoring program design must also take into account the learning resources that can be utilized for realizing its objectives. These typically consist of one-to-one active listening sessions, loosely structured discussions and practical-based exercises. But other resources may be bought to bear including:

> workshops

> field trips

> guest speaking

The design process will set out the most appropriate mix of resources, based on the overall goals and the constraints imposed by the organization/individuals themselves.

4. MATCHING & BIRKMAN'S™ TESTS

The matching of mentor to mentee is probably the most critical aspect of the design process, and the one requiring the greatest skill and professional judgment. In this we are aided by a suite of psychometric tools and reports, as well as close guidance from our clients. We also make particular use of Birkman's™ tests on both mentors and mentees, using our Birkman™-qualified consultants. This profiling technique – focused as it is on the underlying needs of individuals, their stressors and organizational outlook – has been proven most effective at informing good matching decisions.

5. CONTACTS

Only once the pairing of mentor to mentee is properly mapped can the design be extended to include a contact plan. This details the schedule of contacts, by type, frequency and location, and the resources required for each contact.

6. CONFIDENTIALITY

We believe in the precept that trust must be a verb, before it can become a noun. And confidentiality is the critical precursor of trust, and so of the utmost importance in a successful mentoring program. It is through assured confidentiality that trust is built into the relationship, and the full benefits of the mentoring realized. We therefore take particular efforts in the design process to build confidentiality into the program. This is done through careful consideration of the locations, communications, personnel and procedures needed to assure it.

7. METRICS

Any program of learning requires appropriate measures to ensure that objectives are realized for the individuals undertaking it. But unlike traditional training – where specific and easily-measured skills are developed in a controlled environment – mentoring presents challenges in identifying and measuring proper metrics for success. Mentoring develops 'soft' personal skills, and aims for objectives that are not as immediately tangible. Additionally, the learning situation is often informal and loosely structured, without obvious outputs to indicate progress.

Metrics are, however, as critical for soft skill and personal development as they are for the acquisition of hard skills. So we have paid particular attention to ensure our design process captures a proper suite of metric techniques, from the start to the end of the mentoring program. This begins with discussions with the client, their management team, the mentor and the mentee – aiming to define what success looks like,and how it can be shown to have been achieved

From this a system of appropriate metrics is developed. The metric tools we use for recording progress are selected from a suite that have been shown to work well for mentoring, and may include:

> Simple self-measures of participant satisfaction

> Peer and management ratings of mentee

> Graded Kirkpatrick levels of measurement

> Reports from mentor

> Productivity assessments

> Reports from management

The metric process itself is defined by three stages of measurement:

1. **Baseline assessment**: the metric parameters that will define success are measured prior to the start of the mentoring program, to provide a reference point for progress.

2. **Intra-program assessment**: the metrics are updated on a scheduled basis, to inform the mentor and mentee of progress towards objectives. This intra-program measurement should not be too intrusive, but should be milestone-linked, or instigated where either party feels a need to use the information to move the program forward.

3. **Program completion**: this is an event-driven assessment, triggered when both parties feel that the mentoring program has reached its objectives. The results of this assessment, showing whether the metrics have reached the pre-defined levels for success, determine whether the program can be considered completed.

In addition to the metrics assessments themselves, the design phase of the program will need to define the quality procedures to be put in place, to allow for appropriate reaction to the metrics. This may involve corrective action, such as:

> changing the parameters of the program

> reconsidering the mentor-mentee match

> deciding whether the program remains appropriate

> deciding that an early successful conclusion has been reached

THE R. P. DELIO & COMPANY METHODOLOGY

The methodologies and tools utilized by R. P. Delio & Company professionals, to deliver our mentoring and coaching services, are guided by three principles:

> **Pragmatism:** success is not delivered through dogma and theory. We believe that success is ultimately underpinned by learning techniques grounded in real world application

> **Client-tailored:** there is no such thing as an 'off-the-shelf' coaching solution or mentoring design. We believe in the importance of close alignment of the learning process to each individual client situation

> **Result-focused:** we believe in the enabling of concrete, tangible and long-lasting changes that can be shown to define, shape and invigorate the professional lives of senior management.

ENGINEERING LEARNING SUCCESS

R. P. Delio & Company understand that careers, projects and organizations thrive best when the personal, technical and managerial are nurtured in sympathy with one another – not developed apart, and left out-of-balance. We know that design means listening, learning means doing, and insight means playing. We believe that, using our methodology, our experienced mentors and coaches can help channel such holistic and beneficial learning outcomes – Engineering Learning Success for you and your organization.

Business success is not measured by the executive team's ability to imagine a winning corporate strategy, but by their ability to implement that strategy through innovative cross functional initiatives, employing projects to realize these new business capabilities. By partnering with **R.P. Delio & Company** companies benefit from the focus and **attention** that can only come from a small privately held consultancy, committed to **Engineering Program Success**. We understand the challenges organizations face when implementing **transformational** change. Our client's success is achieved through our ability to deliver stakeholders alignment on strategy, initiatives, and scope across the entire portfolio. We bring an unwavering commitment to analytical quality control, crisp communication, the integration of risk management and our strength in construction estimating.

Our focus is on the development and delivery of a programmatic approach to project delivery at the intersection of **renewable energy, public policy, and electrical utility**. We are highly selective in the markets we enter, and leverage being one of the only privately held firms that can bring a global reach and a **local understanding**. We believe the challenge for executives is in the planning, not the executing. Our activities span the full spectrum of facility, technology, process and design. By understanding **relationships** and applying **entrepreneurship**, our vision is helping to build a **cleaner, leaner, greener, brighter better world**.

Here is where we add significant value. We help leading companies drive business transformation by providing **industry leading utility integration renewable energy program management and project development consulting services, methods, financing and tools**. We've been engaged in some of the largest, highest profile and most effective renewable energy business transformation programs in US history. You can rely on us to help you develop a well-crafted strategy and drive a well-executed plan.

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