

Plan With Your Board Of Directors

By Lois Zachary, Ed.D

Nowadays it seems that mentoring is everywhere you turn. Increasingly, individuals seek personal mentors (in addition to or apart from organizational mentors) to guide them at various transition points along their life's journey. A personal board of directors is a unique example an effective mentoring process that can enrich the life planning process.

There are some requirements to make it work well: Self-direction, careful mentor selection, clarity of goals and processes and steadfastness help ensure success for life planning and for other learning goals as well.

Meet Margo. Margo appeared to have it all: early success, admiration and respect of her peers, job offer after job offer and multiple leadership opportunities. Her success seemed to take on a life of its own and before she knew it, she found herself totally swept up in endless activity.

Then one day she met the love of her life, which caused her to pause and reflect on her life's journey and what was really important to her. She realized that it was time to reconsider where she was heading both personally and professionally. She looked around for others "had been there and done that" so that she could gather input and guidance based on lived experience.

She had little time to meet separately with each of the people she had identified, so she narrowed her list down to five and asked them if they would serve as mentors to her. She convened a personal board of directors meeting to begin the process of helping her "figure out the rest of her life."

The board of directors mentoring model that Margo used offers great potential for life planning. The concept is that a group of hand picked mentors functions as a personal board of directors to help facilitate an individual's achievement of a clear and specific learning goal. The BOD has the advantage of providing multiple perspectives and diverse feedback from a variety of mentors at the same time. It clarifies, pushes, broadens and expands the thinking, forces

personal reflection and functions as a sounding board.

Making it work. In the personal board of directors' model, an individual (the mentee), seeks out and recruits multiple mentors to help her achieve specific goals. The mentors meet together with the mentee at regular intervals. The mentee manages the learning process, calls and hosts the meetings and, together with her mentors, shares accountability for the learning process and achievement of desired results. Although the BOD model requires continuous self-management, the rewards reaped as a result far outweigh the time it takes to get started.

Getting started. Mentoring requires careful self-preparation. Preparing for a mentoring relationship need not be time-intensive but it does involve dedicating time to it. Reflect on your purpose for creating a personal board of directors. Be clear and specific about your learning goals and objectives. If your goal is life planning, consider the outcome you want from that: clarity of thought? A direction? A roadmap? Contacts?

Consider whether or not you want to pay your mentors for their time or want to offer some perks or token of appreciation instead. Margo decided not to pay her BOD. Instead she invited them to meet quarterly

at a nearby retreat center and paid for their expenses. Her mentors looked forward to their quarterly meetings because they knew they would be held in a comfortable and relaxing setting. It would give them an opportunity to get away and afford them some relaxation time and the company of other interesting and exciting individuals.

Recruiting. The initial conversation when recruiting mentors for a BOD merits special attention because it sets the tone for the relationship. But first you will need to:



"The rewards far outweigh the time it takes to get started."

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- Reflect on your purpose for creating a personal board of directors.
- Be clear about your own goals, objectives and intention.
- Consider what it is you are willing to contribute to the relationship.
- Be willing to candidly share your needs, expectations and limits.
- Identify the characteristics you are looking for in your mentors

“Ask yourself whether this person will challenge your thinking.”

Selection. Mentor selection is critical to achieving successful outcomes. The natural tendency is to zero in on chemistry when meeting with prospective mentors. If the chemistry doesn't feel right the inclination is to go no further. The initial prospecting conversation should be more than a litmus test for chemistry. It should help gauge the interest of a prospective mentor, check for understanding and determine if there is a good learning fit. Here are some things to consider:

- Do ask yourself whether this person will challenge your thinking and encourage you to constantly raise the bar for your own growth and development.
- Do consider if this person has the expertise, experience, time and willingness to help you achieve your learning goals.
- Do consider if you would feel comfortable learning from this individual.
- Do base your final selection whether or not you feel there is a good learning fit.

Sometimes it takes several initial conversations with different people to find mentors with the right learning fit for you.

The first meeting. In order to take best advantage of the board of directors, it is important to create the right climate. Mentors at the table need to get to know one another and understand what each brings to the enterprise. The individual seeking assistance in life

planning must carefully orchestrate this process in a way that thoughtfully and respectfully honors confidentiality and creates value for the people at the table.

Satisfaction and success for everyone is increased when BOD mentors have a firm understanding of the mentee's desired outcomes. Allot adequate time to clarify mentoring learning goals and needs. Clarify ground rules, boundaries and expectations. Once the deliverables are agreed upon, establish specific processes and procedures for monitoring progress and measuring results. Collaboratively develop a work plan and set the plan in motion.

Maximizing learning. It is up to the mentee to manage the board's process. Keeping a journal or log is one way to monitor learning and to keep the learning focused. Here are some hints:

- Set aside time regularly to write about your experiences. As you describe your learning, consider what happened and what was really going on.
- Don't get bogged down in detail. Capture a brief description and note some specifics, enough so that when you review this later on, you will be able to recall this learning experience clearly. Note your feelings at the time. That is, how were you reacting and feeling at the time?
- Remember that whatever it is that you experience or stimulates your thinking will help you better understand your own behavior. Note these mental machinations along with frustrations, learnings, curiosities, and "magic moments."
- If you get stuck write anything even it is that you have no thoughts. Reflect on why that is so at this particular time. You may find that all you needed was a starting point and the rest will follow

Closing out the relationship. Closure presents an opportunity to evaluate progress and move on,

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regardless of whether or not a mentoring BOD experience has been positive. Coming to closure focuses on reaching a learning conclusion so that learning is elevated to the next level of application and integration.

Success is celebrated, the relationship redefined and mentoring partners move on. An organized mentoring celebration affords the opportunity to celebrate learning, express appreciation to your mentors and plan next steps.

If you are a mentee you will want to involve your personal Board of Directors in planning how to bring the relationships to successful closure. In addition, consider:

- Sharing what you've learned and how you've applied your learning.
- Identifying next steps
- Finding a meaningful way to express your appreciation

Moving Forward. You will need to redefine the relationship going forward. You may or may not want to continue to utilize your BOD for other learning goals. You may want to add new members, retire some of your board members. Some of your board mem-

bers may want to retire themselves. At a minimum you will want to stay in contact with your BOD and issue an annual report on how you are integrating what you've learned.

Margo's board of directors enabled her to jumpstart the life planning process. Her mentors engaged with her as she sorted out her values and aligned her future personal and professional plans with them. The mentors valued and leveraged the new relationships they had formed with one another.

Margo continued to stay in touch with her mentors and keep them up to date on her progress. Her experience sheds light on the potential of a BOD an innovative mentoring model that holds much promise for life planning. ☪

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“Stay in touch, and issue an annual report on how you're doing.”

