

AAO Mentor Handbook



American
Association of
Orthodontists®

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CONTENTS

Contents.....	1
Mentor Roles & Expectations.....	2
Mentoring Format	3
Getting Acquainted.....	3
Means to Communicate	4
Goal Setting & Reflection.....	5
Effective Mentor Strategies.....	6
Effective Online Communication.....	7
Ten Reminders for Effective Mentoring.....	7
Guiding Questions.....	8
Networking Tips	11
Suggested Activities for Mentors and Mentees	12
Don't Lose Sight of Your Goals.....	12
Help During Periods of Transition	13
Need for a Good Closure	13
Provide Regular Feedback.....	13
When Mentoring Doesn't Work.....	13

MENTOR ROLES & EXPECTATIONS

As a mentor, you will invest your time, energy and expertise to nurture the growth of another person. You are the special person who helps others reach their potential. Your style may range from that of a persistent encourager who boosts self-confidence to that of a stern taskmaster who teaches a mentee to appreciate excellence in performance. Whatever your style, it is your care that really matters.

Mentoring is an all-encompassing way to encourage personal growth. Mentoring is often spoken about in corporate circles, but the impact of mentoring can be much deeper than just job skills. Mentors can touch every facet of a mentee's being if the mentee accepts and applies the mentor's wisdom in diverse ways. It is a process in which the mentor and mentee work together to discover and develop the mentee's latent abilities and encourage the mentee to acquire knowledge and skills as opportunities arise. The mentor serves as a tutor, counselor, and friend, enabling the mentee to sharpen skills and increase knowledge.

There are many benefits associated with being a mentor. Mentoring is an opportunity to renew your enthusiasm for your role as an expert; enhance skills in leadership, coaching, and listening; support the growth of orthodontists who represent the future of the specialty; as well as obtain a greater understanding of generational differences and barriers experienced by new orthodontists. Most of all, mentoring leads to personal fulfillment and satisfaction simply by helping others and establishing meaningful relationships.

The following guidelines will help you get the most out of your mentoring relationship.

Mentors should:

- Be an AAO member (required)
- Have at least 10 years of experience post-graduation
- Be no more than 5 years removed from practice
- Be willing to serve in a mentor role for at least 1 year
- Be willing to spend at least 4-5 hours per quarter on preparation and contributions to their mentoring relationships
- Be respected as an experienced and successful professional
- Support the AAO's mission, vision, and program goals
- Have an interest in supporting the growth of others
- Be a positive role model
- Be willing to participate in mentorship training
- Stay accessible, committed, and engaged during the length of the program
- Maintain confidentiality and trust of the mentoring relationship
- Be able to actively listen, communicate well, and ask open-ended questions
- Share candid concerns and feedback to support mentee's journey
- Share "lessons learned" from their own experiences
- Be a resource and sounding board
- Be comfortable in providing feedback to mentees regarding what is working or not working in the mentoring relationship
- Understand that the mentee is responsible for his or her own career development
- Understand that mentors who are not meeting role expectations may be removed from the program

MENTORING FORMAT

One-on-one mentoring connections are established through an online platform called Chronus. The program utilizes an algorithm based on profile information to recommend top matches to the mentee, who can then request mentoring from the mentor of their choice. Mentors and mentees who establish a connection will have access to a shared space that includes resources, tasks, and milestones to help guide the mentoring relationship.

GETTING ACQUAINTED

"Fit and chemistry must be considered when pairing the mentor and the protégé. If the two don't get along, it matters little what each can offer the other in terms of knowledge and skills."

—Michael Zey, Building a Successful Formal Mentor Program

An important part of getting acquainted is determining compatibility. Your mentee should schedule one or two sessions to informally get to know each other before more intense goal-setting. If you sense poor chemistry and worry that it might get in the way of productive mentoring discussions, bring your concern to your mentee and alert an [administrator](#). It is better to discover an imperfect match early.

To begin getting to know each other, online messaging is an unthreatening, flexible approach. Many people find it easier to open up to someone new in writing. Your Mentoring Area includes a messaging component where you can get to know each other, plan meetings, or even discuss progress on tasks and milestones. To break the ice, try sharing a little about yourself:

- ✓ Jobs, hobbies, and extracurricular activities
- ✓ Research, projects, or career-related accomplishments
- ✓ Ways of balancing work with your personal life
- ✓ Practice management and getting started in a career
- ✓ Your favorite class in college, favorite book, favorite movie, etc.

As you get to know each other better, your mentee is encouraged to voice concerns regarding their goals. In some cases you may need to take the initiative to help your mentee express these uncertainties. If your mentee lacks the lexicon to discuss certain issues with you, he or she may try to paraphrase. Take care to understand what your mentee is trying to say. If your online conversations seem to be missing the mark, it may be time to try a new form of communication.

MEANS TO COMMUNICATE

There are various ways in which you can communicate with your mentee(s). These include:

- ✓ Email
- ✓ Social media
- ✓ Discussion boards
- ✓ Audio or video conferencing
- ✓ Meeting in person

When in-person interaction is not possible due to distance and time, we strongly encourage you to use the rich online communication mechanisms found in the mentoring portal, including the messaging feature in the mentoring connection space. It is also important to define the frequency of communication and the preferred method of communication early on with your mentee(s).

File Sharing

In many instances you and your mentoring partner will want to share files with each other. This can be done by using the message feature within your mentoring connection space. All of your messages will be stored under the "Messages tab" where you can locate past communications and file attachments.

The screenshot displays a mentoring portal interface. At the top right, there are two buttons: "Add Meeting" (with a calendar icon) and "New Message" (with a plus icon). Below these is a navigation bar with tabs for "Plan", "Messages" (highlighted), "Meetings", and "Goals". The main content area shows a list of messages with the following details:

- Showing 1 - 5 of 5
- From: Jose, Subject: Reg Task: Upload Mentoring Partnership Agreement, Sep 13
- From: me, Jose, Subject: Reg Task: Preparing for your role as a mentor, Sep 12
- From: me, Subject: Reg Task: First meeting, Sep 12
- From: me, Jose, Subject: New suggesting time, Sep 06
- From: me, Jose, Subject: Connect, Aug 30

On the right side, there are two panels:

- Members (2)**: Lists "Mentor (1)" and "Mentee (1)".
- Upcoming Meetings**: Shows a meeting "Meeting with Jose" on Monday, August 14, 2017, 10:00 am EDT (1 hr), with a status of "Attending". Below it are links for "Add New Meeting", "Record Past Meeting", and "See all".
- Goals**: A section with an upward arrow.

You may also consider the following tools for sharing and storing files:

Dropbox: <https://www.dropbox.com/>

Google Docs: <https://www.google.com/docs/about/>

GOAL SETTING & REFLECTION

It is important to set concrete goals with your mentee(s).

We encourage mentees to take charge of setting pace and direction, and to explore with you how you can help them attain goals. One way you can help is by holding your mentee accountable for defining and documenting goals, as well as steps needed to achieve them. After each meeting, you should review your mentee's summary and timeline to provide shape goals into realistic achievements.

If your mentee has difficulty expressing goals, you can help by asking the following questions:

- ✓ **What are your goals for this mentoring relationship?** (e.g., competency development, career advancement, leadership skills development, gain knowledge in a particular topic area, etc.)
- ✓ **What challenges can you anticipate?** (e.g., availability of advancement opportunities, need to further formal education, time needed to develop a new skill or competency)
- ✓ **What steps do you need to take to achieve these goals?**
- ✓ **How much time will it take for each step?**
- ✓ **How will you know if you reached these goals?** (e.g., improved performance, promoted, attained a new credential, etc.)

This is also an opportunity for you to reflect on your personal goals. Beyond the rewards of helping to shape another's growth, is there anything *you* wish to develop? Do you want to become a better mentor, communicator, listener, or leader? Are you seeking greater self-awareness and fresh perspectives? You will get more out of mentoring if you keep your goals in mind from the start.

EFFECTIVE MENTOR STRATEGIES

There are several strategies that you can employ to become a more effective mentor:

- ✓ **Inspire**—Mentors are more effective when they inspire their mentees. By setting an example, you may be able to motivate your mentee towards future paths that are beyond his or her original dreams. Challenge your mentee to find importance in what he or she aspires to do. Help your mentee create a future vision.
- ✓ **Be an active listener**—A sign of good listening is that your mentee feels he or she has been clearly heard and understood. Your mentee feels accepted and more willing to place trust in the mentoring relationship. To demonstrate active listening, show interest in things your mentee has mentioned in the past.
- ✓ **Share similar experiences**—Mentors are not expected to be superheroes. Most of the time, they are people who have already been through what their mentees now face. Help your mentee feel empowered to embrace challenges by sharing your experiences.
- ✓ **Challenge and support**—A mentee often seeks support such as validation or affirmation, but sometimes challenge will bring out his or her best. There may be moments where you will disagree, give a different point of view, or suggest a different course of action. Ultimately it is the mentee's decision to act on your advice.
- ✓ **Provide corrective feedback in an encouraging manner**—It is not easy to take feedback well. However, hearing it in a motivating and encouraging tone can help your mentee accept and apply feedback readily.
- ✓ **Speak of your mentee in positive or neutral ways**—Your mentee needs to trust that your discussions are confidential and that the mentoring relationship is mutually supportive. When speaking of your mentee to others, provide only positive or neutral comments.

EFFECTIVE ONLINE COMMUNICATION

Communication is a two-way process that includes just about any type of interaction with another person, from subtle to overt. Poor communication can leave us feeling angry or worried.

In person or on the phone, you can use voice modulation, facial expressions, and hand gestures to convey meaning. Because those cues are absent in writing, written communication is a skill and an art. The better people can express themselves, the more the relationship will deepen.

When communicating through writing, the following tips will help prevent miscommunication.

- ✓ **Meaningful subject line**—A good subject line ensures that the recipient recognizes the importance of your message and doesn't delete it accidentally. The subject line should also serve as a summary, providing a clear idea of the topic you want to discuss.
- ✓ **Clear and concise messages**—Take the time to write clear, concise messages. Correspondingly, if you receive messages that are not clear and concise, take the time to get clarification. Do you clearly understand your mentee's message? If not, provide an opportunity to restate, elaborate or reconsider the intended message.
- ✓ **Investigating assumptions**—What assumptions may have been made, whether stated explicitly or not? To uncover assumptions and prevent misinterpretations, state your understanding of your mentee's message or ask for clarification.
- ✓ **Communicating about communication**—It is very important to inform your mentee of your schedule well in advance. This prevents the unnecessary frustration of a communication breakdown.

Online messaging has its challenges, but it also has advantages in many situations. If you use the messaging section of your Mentoring Connection Space liberally and thoughtfully, you are more likely to be productive.

TEN REMINDERS FOR EFFECTIVE MENTORING

1. Be helpful, interested and engaged. When you talk with your mentee, clear your mind of unnecessary thoughts so that you can offer your undivided attention.
2. Establish rapport by learning or remembering personal information about your mentee. Write it down so it's available for recall when communicating with your mentee.
3. Follow up frequently. Keep in frequent contact with your mentee. Even a short email or phone call can make a big difference.
4. Be available and keep your appointments.
5. Be firm and hold your mentee accountable for commitments and goals.
6. Stay positive. Focus on strengths and potentials rather than limitations.
7. Be objective and talk about the pros and cons of ideas, people, etc.
8. Reevaluate the effectiveness of your mentoring and adjust your style as needed.
9. Be yourself and allow your mentee to do the same.
10. Be an active listener.

GUIDING QUESTIONS

Below you will find sample questions you may consider adapting to your mentoring conversations.

To initiate exploration:

- ✓ What factors are impacting the situation?
- ✓ How do they affect the situation?
- ✓ What are the implications?
- ✓ Why change?

To facilitate learning:

- ✓ What do we know?
- ✓ Are these facts or assumptions?
- ✓ What else do we need to know?
- ✓ What could be different?
- ✓ What then, are realistic goals?

To guide planning:

- ✓ What are the desired outcomes?
- ✓ How might these goals be achieved?
- ✓ What actions would be needed?
- ✓ What might be the consequences of the actions contemplated?
- ✓ How will it be done?
- ✓ What resources will be needed?
- ✓ How will progress be monitored?
- ✓ When will action begin?

To support experimentation:

- ✓ How is it going?
- ✓ Are adjustments needed?
- ✓ Are the expected outcomes being produced?
- ✓ Are there unexpected outcomes?
- ✓ What would be done differently next time?

To discuss strengths:

- ✓ What do you do really well?
- ✓ What are your greatest achievements so far?
- ✓ What has helped you accomplish this?
- ✓ What are you most proud of?
- ✓ What attributes enabled you to do that?
- ✓ What three objectives describe you at your best?
- ✓ What do you regard as your greatest strength?
- ✓ What do you see as your biggest asset?
- ✓ What challenges have you overcome?
- ✓ How did you do that?
- ✓ What do others compliment you on?

To discuss opportunities:

- ✓ In what situations do you excel?
- ✓ How does what you do help others/the organization?

MENTOR HANDBOOK

- ✓ What could you change to get better outcomes?
- ✓ What motivates you?
- ✓ What do you want to learn or develop?
- ✓ Where do you see that you have a contribution to make?
- ✓ What help and support can you give/get from others?
- ✓ Who is the most motivated person you know? What strategies do they use to keep motivated?
- ✓ What are your challenges or obstacles and how can you reframe them as opportunities?
- ✓ How can you draw on your strengths and abilities?

To discuss aspirations:

- ✓ Where do you want to be in a year's time?
- ✓ What is important to you?
- ✓ What are you aiming for?
- ✓ Who are your role models?
- ✓ What are your values?
- ✓ What do you want to be remembered for?
- ✓ What roles attract you?
- ✓ Are there things you haven't experienced yet that you want to?
- ✓ What's your vision for yourself?
- ✓ Look into the distant future; see yourself as happy, successful, and fulfilled. Describe the scenario.

To discuss results:

- ✓ What outcomes do you intend to achieve?
- ✓ What would success look like for you?
- ✓ How will you know that you have achieved your goal?
- ✓ How will you measure the results?
- ✓ What are the reasons you want to achieve this goal? What will it do for you? What will you get?
- ✓ What do you want to be known for?
- ✓ What is the legacy you want to leave?
- ✓ What does life-balance mean to you?
- ✓ If you were truly satisfied, describe how would it be?

To clarify values:

- ✓ Who are your heroes and role models?
- ✓ What qualities do you most admire in them?
- ✓ What fires you up?
- ✓ What's most important to you?
- ✓ How would spend your time if you didn't need to work?
- ✓ Describe a dream day.
- ✓ What do you do outside of work?

To discuss career:

- ✓ What is most important to you in life and work?
- ✓ How happy are you with your work-life balance?
- ✓ Which are the skills you are best at and enjoy using most?
- ✓ How satisfactory is your current level of performance?
- ✓ Which areas of performance would you like to improve?
- ✓ What are you passionate about?
- ✓ What potential constraints must you take into account when planning your career?

MENTOR HANDBOOK

To support skill development:

- ✓ What changes are you likely to need to deal with in the near future?
- ✓ What results would you like to achieve, that you are not achieving now?
- ✓ What new skills do you want to develop?
- ✓ What skills do you want to improve?
- ✓ Which areas of your performance need to improve?
- ✓ What knowledge, information, or qualification do you need to acquire in the near future?
- ✓ In terms of skills, how might you close the gap between where you are and where you want to be?

To elicit open-ended responses:

- ✓ Open questions begin with who, what, where, how, or when. These help elicit information. In contrast, closed questions usually obtain a yes or no response.

To soften a confronting question:

- ✓ Do you mind if I ask...?
- ✓ I'm wondering...
- ✓ Would you like to tell me...?

To probe:

- ✓ Can you say a little more about...?
- ✓ Would you expand on that idea?
- ✓ Perhaps you'd like to tell me...

To summarize for understanding:

- ✓ So what you're saying is...
- ✓ What I'm hearing is...
- ✓ From your point of view...

To question generalizations:

- ✓ Always?
- ✓ Everybody?

To clarify questions:

- ✓ What specifically, do you mean by...?
- ✓ Which particular...?
- ✓ How, specifically...?

To find the root cause:

- ✓ Why do you think they responded that way?
- ✓ What other factors are contributing to the situation?

To seek information:

- ✓ How did you respond to that?
- ✓ What did you do about this?
- ✓ What options have you considered?

To challenge:

- ✓ What are your reasons for saying that?

- ✓ What has led you to that conclusion?
- ✓ Do you think other people would see it that way?

To elicit action:

- ✓ What could be done to improve the situation?
- ✓ How might you go about achieving that?
- ✓ What specifically, do you plan to do?

To prioritize:

- ✓ What will you do first?
- ✓ What is the next step?
- ✓ Is there a logical order in which to proceed?

To predict:

- ✓ What are the likely consequences of this?
- ✓ Are there other possible repercussions?
- ✓ If you do nothing, what will happen?

To hypothesize:

- ✓ What would you do if...?
- ✓ How would you handle...?

To reflect:

- ✓ What are the implications of...?
- ✓ What insights have you gained as a result?
- ✓ What have you learned from this incident?
- ✓ What could you do differently next time?
- ✓ How is this situation like others you have dealt with?
- ✓ How do you feel about that?
- ✓ How is that sitting with you?
- ✓ What is your heart telling you?

NETWORKING TIPS

In your daily life, you probably network all the time simply by meeting, connecting, and keeping in touch with others. You know firsthand that quality relationships can enrich your life and empower you to achieve your goals. It's likely your mentee also realizes the importance of developing and maintaining a strong network, and would appreciate hearing your personal approach. Some suggestions on how to help:

- ✓ Let your mentee know how networking has helped you advance your career, from landing a job or promotion to finding new patients.
- ✓ Share ideas about effective communication, making sure to build on your mentee's comfort level with networking. Examples include smiling, eye contact, active listening, body language, complimenting, and finding common interests over which to connect.
- ✓ Share your techniques for starting conversations, such as an opening line when meeting people or a list of get-to-know-you questions.
- ✓ Share your thoughts about maximizing the benefits of attending professional business meetings.
- ✓ Share your process to teach your mentee on how you got involved in research, started a business, or advanced into a leadership position.

- ✓ Share your thoughts on unethical networking practices. For example, you can tell your mentee why it is never a good practice to contact long-forgotten connections only when you need something like a job referral.
- ✓ Finally, we hope you will be willing to share a few contacts that may help your mentee reach his or her goals.

SUGGESTED ACTIVITIES FOR MENTORS AND MENTEES

Below are a few suggested activities to do with your mentee:

- ✓ Read a chapter of a relevant book each week/month and discuss how it applies to the mentee's situation.
- ✓ Use the results of an instrument such as the Myers-Brigg Type Indicator, Life Styles Instrument, DISC or any sort of 360 degree feedback as a basis for development.
- ✓ Pick (or imagine) a movie that represents your life. Which character are you? How do the events in the movie reflect your life/career?
- ✓ Ask your mentee to prepare a list of questions and interview you about your career or experience.
- ✓ Have your mentee do some fact-finding about a relevant topic. Discuss what they discovered and how your mentee might use it.
- ✓ Practice a conversation with your mentee that he/she might need to have with his/her manager or colleague or during a job interview. Provide feedback and coaching to help your mentee produce the outcomes he or she wants.
- ✓ Have your mentee draw a picture/make a collage or vision board to graphically represent where he or she sees him or herself going or what's important to him/her.

If you meet your mentee in person:

- ✓ Meet for lunch and get to know each other over goal-oriented topics such as favorite classes, career path, and hobbies.
- ✓ Introduce your colleagues, especially anyone who may be of professional interest to your mentee.
- ✓ Tour your workplace or research facility.
- ✓ Allow your mentee to accompany you in meetings or in your daily work as a silent observer. Then allow him or her to ask questions and discuss what they learned.
- ✓ Visit some of your favorite places in your city.
- ✓ Attend cultural or sporting events together.

DON'T LOSE SIGHT OF YOUR GOALS

There might be times in your mentoring relationship when progress might stagnate and you need to re-energize. At such times, try the following:

- ✓ Revisit the goals that you have set for your mentoring partnership and for yourself. Are you on course?
- ✓ Could you have done something better? Enthusiasm can help you and your partner move forward.
- ✓ Do you think you need to extend the mentoring period? Learning, as they say, never stops.

Your commitment to the mentoring partnership will be more successful if you both regularly reaffirm and redefine your goals and timeline. We recommend revisiting your goals every 3-6 months.

HELP DURING PERIODS OF TRANSITION

As the mentoring partnership nears completion, your mentee may wonder whether his or her takeaways will smooth the transition to future endeavors. There may be loose ends yet to tie and some fears about moving on.

It's important to discuss your mentee's transition to post-mentoring endeavors. You may be in a position to help your mentee better prepare for what lies ahead and thus reduce any anxiety about the changes waiting around the corner. Your advice could help your mentee realize his or her full potential.

NEED FOR A GOOD CLOSURE

When mentoring partnerships end, some do so with goals accomplished and some do not for a number of reasons. Yet even unproductive mentoring relationships can benefit from good closure. A successful exit strategy includes five steps:

- 1. Processing conclusions**—Process the learning that took place while working towards goals.
- 2. Integrating what was learned**—Discuss how to apply and take learning to the next level.
- 3. Celebrating success**—Plan a mutually satisfying way to celebrate achievement and new beginnings.
- 4. Redefining the relationship**—Talk with your mentee about whether the relationship is to continue, and what it will look like: will you become a colleague, a friend, or something else?.
- 5. Moving on**—Both partners let go and identify ways of keeping in touch, if appropriate and mutually desired.

PROVIDE REGULAR FEEDBACK

It is important to provide feedback regularly on your mentoring experience and your mentoring relationship to the program administrators. Please complete any surveys you receive. Your feedback will help your administrators learn how to serve you better. Your mentee needs your constructive feedback too—and your tactful guidance may even improve the quality of the relationship.

WHEN MENTORING DOESN'T WORK

If you feel that the mentee you have been paired with is not working, [let us know](#). The earlier the better so we can work to pair you with someone who is better suited to help you meet your goals.