



# IAIP MENTOR TOOLKIT

## GETTING STARTED

Welcome to the IAIP Mentoring Program! This program is possible because of your commitment and enthusiasm to connect members and build careers. Thank you for participating.

IAIP's Mentoring Program is a program established to help acquaint new members with the structure and benefits of IAIP from the International level down to the local or MAL level. Having a mentor is useful not only for new members but also for some of the more experienced IAIP members. With a mentor's guidance, more seasoned members can further refine their skills, learn more about a particular aspect of insurance, gain a new designation, or learn a new technical skill. A mentor can also provide helpful feedback that will encourage the member to build upon and perhaps revitalize the skills they already possess. The Program is designed to be flexible and open to anyone wanting short-term or long-term mentoring.

As a mentor, you are a guide, role model, and resource. By taking this opportunity to share your association and professional experiences, you have a chance to advise, influence, and support members. A mentor/mentee relationship provides many opportunities, offers many challenges, and has many rewards. Experience them for yourself.

As a mentor, you assume several roles:

**Resource Person:** Share your knowledge of IAIP, advise the mentee on how active membership will reward them personally and professionally, assist with networking within the association, and how to make professional contacts.

**Motivator:** Express belief and confidence in the mentee's abilities and encourage them to try new things.

**Supporter:** Encourage open and honest dialogue and listen and respond to the needs of the mentee.

**Coach:** Help the mentee to develop and work to achieve realistic and meaningful goals for their career.

## BENEFITS TO MENTORS

- Develop meaningful connections and benefit from positive and enriching new relationships
- Refine coaching and mentoring skills
- Learn more about the next generation of insurance professionals and IAIP members
- Learn the new information and perspectives often offered by mentees
- Remain productive as you continue to make use of your knowledge and skills
- Do something for others. Much can be said about the pleasure we receive from helping someone else. To do so is not only a confirmation of our skills, but we also feel good about ourselves when we help someone achieve their goals.
- Receive recognition, as mentors are respected and appreciated by fellow members for helping people
- Earn the gratitude of mentees.

# BENEFITS TO LOCAL ASSOCIATIONS

Local association mentors should be committed to helping their association to be fully active and involved and satisfy the members. Starting a mentor program will help in attaining this goal. However, mentors must be committed to helping. Associations should encourage members to mentor one another to ensure the following:

- Have more members. Member retention increases because members quickly become involved in the association and develop friendships. When members are satisfied, they stay in their associations longer.
- Have more satisfied members. Members continue to learn, grow, and enjoy the association experience.
- Share knowledge. Mentors within the association are also seen as experts within the industry and are sometimes called upon by outside organizations for their expertise. They share and commend the benefits of being a member of IAIP and a mentor.

# EXPECTATIONS FROM A MENTOR

**Availability:** You must have time to spend with members, ideally 15 minutes or more each week, per member. New members may require additional time until they become more familiar with the association and their role within it. You should be willing and able to consistently communicate (in person, by email or phone) at least once a month.

**Guidance and Support:** Help the mentee to set, track, and adjust their goals.

**Responsiveness:** Respond to all communications, if not immediately, then certainly within a few days.

**Patience:** Let your mentee drive the relationship. Allow and encourage them to initiate contact and lead discussions. People learn at varying speeds, and some need more guidance than others. You should be willing to provide whatever it takes to help the mentee.

**Professionalism:** Approach the mentoring relationship with an open mind, professionalism, and respect. Tact and diplomacy are vital. As a mentor, always be careful to say and do things that will motivate and encourage the mentee. Be loyal and take care not to betray the mentees' confidences.

**Confidence:** You need to be self-assured and friendly.

**Good listener:** A mentor must listen carefully. Simply listening without taking on the other person's problem can be of great help to the mentee. You can enable the mentee to articulate the problem and sort things out just by listening.

**Concern for others:** You must genuinely care about other people and truly want to help them.

**Organization:** You will need to be organized to be able to schedule time to manage the meetings with the mentee to ensure that they are able to maintain their commitments.

What is not expected of a mentor?

- To initiate all contact
- To have all the answers
- To offer jobs or internships

# MENTOR GUIDELINES

The mentor's duties will vary, depending on whether their mentee is a new member or a seasoned member. After the assignment of a new mentee, the mentor should undertake the following:

- Initiate contact with the mentee within the first two weeks of assignment or new member's membership activation.
- Orient a new member to the association.
  - Explain the different levels of IAIP and their importance.
  - Share information on special association awards, events or other special activities or procedures
  - Help the mentee become comfortable and a part of the association in any way you can.
  - Introduce a new member to the IAIP website and help them locate and access all the educational opportunities and resources available to them, as well as social media outlets, including International, Regional, Council and local, as available.
- Determine if the relationship will be formal or casual and how and when you will communicate with each other. Renegotiate as needed.

## FIRST SIX MONTHS

- Initiate contact with mentee twice a month, either by email or phone
- Ask why they signed up for the mentoring program, if they have any specific goals, concerns or questions
- Confirm the new member is receiving emails and other communications from the local association as well as state, regional and International
- Discuss attendance and participation in meetings

Arrange a meeting (by phone or meet before/after regular dinner meeting) and share with the new member the following:

- educational benefits/offerings of IAIP
- scholarship and leadership opportunities extended to members of IAIP
- designation programs

Concerning the programs, the mentor should inquire if the new member is interested in the following:

- education and designation attainment as a professional goal
- professional development (CLP, CIIP, etc.)
- scholarship information to attain their educational/designation goals

Describe the organization. Acquaint the mentee with the International structure, including the local, council, and International levels, and the purpose of each. Help the mentee understand how the organization works, the mentee's role in the organization, and the leadership opportunities available. Set goals at the beginning of the relationship. This is critical because it gives you direction to the relationship and guides you as to how to best help your mentee:

- Do they have career and professional development goals?
- Do they have goals geared toward career advancement?
- Do they want to serve on committees or work towards various leadership levels?

Engage the new member at local meetings and events, introduce them to other members they may not have met yet, and perhaps sit by them at the dinner meetings a couple of times. Be sure your mentee is introduced to officers and committee members and ask them if they would like to become more involved by volunteering to help on a committee.

## AFTER SIX MONTHS

The mentor should perform the following:

**Maintain monthly contact** with the new member (outside of monthly meetings), either by email or phone, to encourage the new member to come to monthly meetings and other IAIP functions.

**Encourage the new member to renew** their membership (as appropriate depending upon when the member joined) in IAIP. If the new member is hesitant about renewing, the Mentor should inquire as to why and be able to assist in retaining the member.

**Acknowledge progress.** Ask for a time during an association meeting to mention your mentee and their progress. Such recognition shows that the association cares about the mentee's progress and motivates the mentee to continue.

**Explain leadership opportunities.** Describe how the mentee can develop leadership skills by serving as an officer. Help the mentee select a leadership role in which to serve and discuss when the mentee would serve. Be sure these goals are reasonable. The mentor shall be responsible for reporting to the RVP and Region Membership Director any problems the mentee experiences if it falls within that chairman's realm of duties to remedy any situation related to their membership with IAIP.

# HOW TO BUILD YOUR RELATIONSHIP

Your mentee has sought a mentor for a reason, and it is up to you to help them determine what they need. You may use the following strategies to help your mentee:

**Tell your story** and share your interests and professional background. Establish breathing space by letting them know your past experiences, work-related challenges, and successes.

**Offer options, not solutions.** Ask the mentee what they are thinking and help them process their ideas.

**Encourage your mentee to be realistic** in their goal setting. When climbing a ladder, you must always start at the bottom and work your way up. For instance, someone new to the industry would probably be better suited to work for an entry-level designation, such as Certified Insurance Service Representative (CISR), among others, and work up to the Certified Insurance Counselor (CIC) or Chartered Property Casualty Underwriter (CPCU) designation. Also, encourage them to work towards IAIP's Certified Insurance Industry Professional (CIIP) designation along the way.

**Introduce them** to others in your personal network.

Determine if they desire to improve their communication skills; if so, **suggest Confidence While Communicating (CWC) program** and work with them to get enrolled in the first available class.

**Ask them questions.** They may be too shy to offer their impressions on their own, but gentle coaxing on your part will do the trick. Concentrate on being positive. If they are uncomfortable at the local association meetings, try to determine why. Once you know that, it is much easier to implement a plan to help them overcome such feelings.

Invite them to **get involved** by volunteering in a small capacity on a committee.

**Share** with them how you have benefitted from your membership with IAIP, including your own goals and aspirations. You are proof and inspiration that they can achieve their own goals.

# MENTOR/MENTEE LIFESPAN

While a mentor/mentee relationship does require some time and commitment, the relationship does not last forever, nor should it. The purpose of mentoring a new member is to teach them to think and act independently and successfully.

The purpose of mentoring a seasoned member is always specific and finite as well. Once mentees have developed to the point where they are functioning effectively on their own, mentors' services are no longer needed. Most likely, the mentor/mentee relationship will turn into a strong, warm friendship. Mentors can find new mentees to help, and former mentees will have the skills and knowledge to become mentors themselves.

At the end of your mentorship, your Membership Director or RVP will have a short evaluation form for you to complete. Be candid with your feedback, as it will help the IAIP Mentoring Program to continue to grow and prosper.

***If, at any time, your relationship with your mentee is not productive or otherwise becoming problematic, please do not wait to notify your RVP and/or Membership Director for assistance.***

Timing is very important, so please contact these individuals immediately if there is an issue. It will help relieve any anxiety or pressure for both you and your mentee. Also, remember to not take it personally, as being a successful mentor and mentee also requires a degree of human chemistry, and through no fault of anyone's, different personalities don't always mesh. By alerting the RVP and/or Regional Membership Director of any problems or intuitive feelings you may be experiencing, they can assign the mentee to another mentor before you and/or the mentee becomes discouraged.

**IAIP gratefully appreciates the members who have agreed to become mentors.**

Remember, your mentees are the next generation of mentors for your association! And as our mentees prosper, so will IAIP.