Mentoring At a Distance: Strategies for Success
Lois J. Zachary, Ed.D.

Mentoring at a distance provides multiple opportunities and challenges for even the most savvy mentors and mentees. Knowing what strategies to use and when distinguishes successful from unsuccessful distance mentoring experiences.

The hierarchical transfer of knowledge and information from an older, more experienced person, to a younger, less experienced person, is no longer the prevailing mentoring paradigm. Mentoring has become less product-oriented (characterized by transfer of knowledge) and more process-oriented (involving knowledge acquisition, application and critical reflection). The protocol for mentoring is grounded in a reciprocal and collaborative learning partnership between two (or more) individuals who share mutual responsibility and accountability for reaching mutually defined mentee learning goals.

Distance mentoring offers a learning opportunity for engaging in a geographically diverse mentoring relationship that takes place when it is not feasible, desirable or convenient for mentoring partners to meet on a regular face-to-face basis. Although distance mentoring relationships typically use electronic space to bridge the physical distance of the relationship, it can be effectively combined with face-to-face mentoring interactions and print materials.

No matter what the medium, the heart and soul of every successful mentoring partnership rests on learning and relationship. First, learning is the fundamental process, purpose and product of mentoring. Without learning, there is no purpose for mentoring. Second, mentoring relies on continuously connecting and cultivating the relationship. While all communication potentially can create misunderstanding, mentoring at a distance can be a formidable task because the feeling of connection is frequently lost through electronic communication.

Four Phases

All mentoring relationships are composed of four sequential phases - preparing, negotiating, enabling and coming to closure. Each builds on the previous phase to form a
predictable developmental sequence. The phases vary in length from one relationship to another. When phases are taken for granted or skipped over, a mentoring relationship can be negatively impacted. Merely being aware provides significant signposts (Zachary, 2000) to stave off potentially negative consequences.

This article describes each phase, poses related questions for reflection, and offers success strategies to enhance distance mentoring relationships.

Preparing

Each mentoring relationship is unique. It doesn’t matter how often you’ve been engaged in a mentoring relationship. Facilitating successful mentoring relationships requires reflective practice and preparation of both oneself and the relationship. Preparing the relationship adds value to the mentoring partnership for mentor and mentee.

Preparing Self: During the preparing phase of a mentoring relationship several processes take place simultaneously. Mentors explore personal motivation and their own readiness to be a mentor. Individual assessment of mentoring skills helps identify areas for the mentor’s learning and development. Clarity about expectation and role helps define parameters for establishing a productive and healthy mentoring relationship.

Success Strategy #1

Before an initial meeting with a prospective distance mentoring partner, reflect on answers to the following questions:

- Why do I want to be a mentor?
- Is mentoring right for me?
- Am I ready for a mentoring relationship?
- What mentoring skills do I have?
- What mentoring skills do I need?
- What are my personal development goals as a mentor?
- How will I go about enhancing my skills?

After answering these questions, you may decide that mentoring is not for you. Remember that the mentor role does not fit every individual. You may find that you are not sufficiently motivated for this role at this time.
Preparing the Relationship. Distance mentoring relationships generally take more time and effort to establish than face-to-face relationships. The initial conversation, in which potential mentoring partners explore mutuality of interests, learning needs and determine learning fit is critical. The outcome of this conversation helps mentors determine how productively they can work with a prospective mentee and to what extent they believe they can honestly further this person’s learning.

It takes work to establish multiple and meaningful points of connection. Begin the initial mentoring conversation by establishing points of connection and getting to know one another. Share information about past mentoring experiences.

Success Strategy #2

Recall any existing (or previous) long distance relationship. Consider the issues and challenges you faced in the relationship. Develop a list of the challenges both positive and negative. When you “meet” with your mentoring partner, ask about challenges, both positive and negative, that she had to overcome in creating and sustaining a long distance relationship. Once you have exchanged lists with your mentoring partner, discuss the implications of your experiences (successes and failures) for your mentoring relationship. What will work? What will not?

A frank exchange about learning goals, mentoring expectations, role assumptions, learning needs, and role limitations is critical to gauging if your experience or expertise is relevant to achieving the desired learning goals. A discussion about learning styles helps identify style compatibility. You will also want to explore whether distance mentoring is the appropriate vehicle for you and your mentee. By the end of the initial mentoring conversation (be it one or several sessions) both parties should know whether or not there is a fit and if they are prepared to move forward in the relationship.

Success Strategy #3

Ask yourself the following questions before you proceed to the next phase of the relationship:

- Am I clear about my role?
- Is this particular relationship right for me?
- Do I have the time to do justice to this relationship?
- Is distance mentoring compatible with my learning style?
- Am I comfortable with the technology?
- Is my mentoring partner(s) comfortable with the technology?

Negotiating. Negotiating is the contracting phase of the relationship. During negotiating conversations depth, specificity, and framework are added to the general goals identified during the previous phase. This is when details of the relationship get spelled out: when and how to meet, responsibilities, criteria for success, accountability and how and when to bring the relationship to closure. Although there is a natural tendency to skip over this phase of the relationship when mentoring at a distance, effective electronic conversation is essential to creating the shared understanding or working agreements about the “softer” issues in a relationship. The outcome of this iterative phase should be a partnership workplan consisting of well-defined goals, criteria and measurement for success, delineation of mutual responsibility, accountability mechanisms, and protocols for dealing with stumbling blocks.

Mentoring relationship failure is often attributed to lack of time. Mentors often underestimate the necessary time commitment to establish and build a long distance mentoring relationships. Regular contact (be it weekly, daily, monthly, etc) is vital, however, regular contact by itself won’t suffice. There should be mutual consensus about the meaning of “regular” and a decision to adhere to that agreement. Time also becomes problematic when available time is not used well. The time management discussion is an essential part of the negotiation conversation agenda. Discuss what you and your mentoring partner do individually and collectively to maximize the time you do have.

Success Strategy#4

Brainstorm a list of learning opportunities with your mentoring partner. Consider combining several mediums: email, video conference, telephone, chat room formats, attending meetings together. Consider multiple venues. What kinds of opportunities exist to get exposure to new learning? What kinds of opportunities exist to reinforce new learning? What kinds of opportunities might accelerate learning?
Success Strategy #5

Before you move into the enabling phase, answers to the following questions should be crystal clear to you and your partner.

- What are the learning goals?
- What are the learning needs?
- Is there a mutual understanding of roles?
- What are the responsibilities of each partner?
- What are the norms of the relationship?
- How often will we “meet”?
- Who will initiate contact?
- What are the boundaries and limits of this relationship?
- What is our workplan?

Enabling. The enabling phase is when most of the learning between mentoring partners takes place. Each mentoring relationship is unique and finds its own path during the enabling phase. This phase, the longest of the four, offers much opportunity for nurturing learning and development. It is also when mentoring partners are most vulnerable to relationship derailment.

The mentor’s role during this phase is to nurture mentee growth by maintaining an open and affirming learning climate, by asking the right questions at the right time and by providing thoughtful, timely, candid and constructive feedback (Zachary, 2000). During the enabling phase, the learning progress and the learning process are continuously monitored to assure that the mentee’s learning goals are being met.

Feedback is a powerful source for learning and critical for facilitating mentoring relationships. It is difficult to create a learning environment, build and maintain the relationship, monitor process, evaluate progress, foster reflection and assess learning outcomes without ongoing feedback. When feedback is given and received in the right way it nurtures the growth of the mentoring relationship. When it is given or received in the wrong way, it can undermine the relationship. Mentors enrich the feedback process when they develop a climate of readiness and expectation. Providing feedback without establishing a climate of readiness can be a frustrating and negative experience for mentees and mentors.
Success Strategy # 6

Regular feedback provides support to meet learning challenges as they occur.

- Set clear expectations about the feedback you provide.
- Acknowledge the limits of that feedback.
- Be authentic and candid.
- Focus on behavior, not personality.
- Consider the timing.
- Be constructive.
- Ask for feedback on your feedback.

Whether the mentoring session is a face-to-face interaction, a telephone conversation or online communication, evaluating the effectiveness of the mentoring session should be routine. Check in at the beginning of your mentoring session. Regularly ask, “How is it going?” Share your observations about how things are going and what concerns you have about the learning process. For example, “I’ve noticed that our discussions are very general and theoretical. Are you finding that helpful?” Take a step backward before you go forward. For example, “Let’s take a look at how we are doing. What is particularly helpful to you in your learning? What has been least helpful? What do you think is going well? What do we need to improve? What kind of assistance do you need?”

Long distance mentoring communication often gets accomplished in sound bites -- a quick email, a fax, or a very short conversation. At other points, longer conversations or exchanges take place. Knowing which to use and when is advantageous.

Success Strategy #7

In monitoring the communication that takes place, do you . . .

- Actively listen?
- Checkout assumptions about what is going on periodically?
- Share thoughts and feelings authentically?
• Maintain sensitivity about the mentee's personal and learning needs?
• Discuss accountability and follow up regularly?
• Reflect on the learning that is taking place?
• Focus on learning goals?

Coming to Closure. Coming to closure presents a developmental opportunity for mentors and mentees to process their learning and move on regardless of whether or not a distance mentoring relationship has been positive. The reasons are legion. Anxiety, resentment or surprise can potentially sabotage the closure experience. It is difficult to plan for closure. Relationships can end earlier or last longer than anticipated. Sometimes a mentoring relationship doesn’t end because of the emotions and personal ties inherent in any relationship. Sometimes inertia or sense of comfort sustains a mentoring relationship long after the relationship should have ended. Closure involves evaluating the learning, acknowledging progress and celebrating achievement of the learning. When closure is seen as an opportunity to evaluate personal learning and take that learning to the next level, mentors leverage their own learning and growth.

Be prepared with an exit strategy. A good exit strategy includes four components:
1. A learning conclusion (reflection on learning outcomes and process for integrating what was learned (how to apply the learning and taking it to the next level)
2. A meaningful way to celebrate success (collaboratively planning a mutually satisfying way to celebrate)
3. A conversation focusing on redefining the relationship (talking about how the relationship is to continue, whether it moves from professional mentoring relationship to colleague, friendship, or ceases to exist at all)
4. A comfortable way of moving on (acknowledging transition and identifying ways to sever the relationship or stay in contact)

Long distance mentoring partnerships require continuous investment of time, energy and effort. There is no magic bullet. Applying these seven strategies for success can facilitate the process but do not ensure success. Generative quality distance mentoring success results when
mentoring partners value the learning as much as the relationship and ask reflective questions that stimulate bold insight and deep understanding.

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