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Line Management and Mentoring

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ABSTRACT

What makes a good mentor, and does this necessarily translate into what makes a good manager? In a technical industry, I would argue the two roles require different sets of skills and provide different benefits to employees. Both mentor and manager are key roles in the development of SAS programmers, but how do they differ to each other? This paper will suggest the skills required for each role and how to use each effectively to develop and retain staff. I will present examples from my own career from the perspective of employee, mentor and manager and link this to literature supporting the benefits of various approaches to both.

INTRODUCTION

The most valuable asset of a company in a services industry, such as a CRO, is not a physical item, it is their employees. The quality of their product has a direct correlation with the skills, experience and motivation of their staff. In order to maintain this talented and motivated workforce, staff retention must be at the core of the management structure and company ethos. Looking beyond quality, staff turnover is expensive; considerably more than just the direct cost of re-hire (recruiter fees, welcome bonuses etc.). Consider the hours spent to review CVs, interview, and follow up with references, extensive training to get even skilled recruits onboarded and even potential costs of loss of business due to staff shortage or reduced utilization.

Increasing staff retention will result in increased quality, productivity and morale. Research shows the majority of employees in this sector rate ongoing education and a clear career path as important factors when making career decisions. In order to promote these opportunities, a company must develop supportive networks for their employees, this cannot be an afterthought. The line manager is a key link in this process, but this paper aims to discuss other key individuals and the roles they can take in the professional development of colleagues.

UNDERSTANDING THE TERMS

Throughout this paper I will refer to the mentor and the manager. Beyond the basic definitions, there can be wide ranging understanding of the exact responsibilities of each and are open to individual interpretation. Although some of the skills required for both roles do overlap, it is important to understand the inherent differences in the approach required to perform each successfully and the benefits of involving more than one person. This is my interpretation based on personal experience:

Manager – A superior, responsible for overall support, identifying ability and potential while encouraging responsibility and personal development.

Mentor – experienced person offering guidance and support on a specific skill or task.

THE MENTOR

The mentor relationship should be of a pre-agreed duration, generally until the task is complete, or the mentee has acquired sufficient skills to work alone. The end date should be agreed in advance to give both parties a clear understanding of the expectation on them. This also helps from a resourcing standpoint to avoid unexpected impact on study work, especially for the mentor. The agenda should be specific and targeted at the initial skill or task to prevent distraction from the goals. This form of relationship is about the mentor passing on their knowledge and experience of a specific task while the mentee develops. The goal is agreed in advance and progress measured against the goals at agreed intervals and the end of the relationship. If the goals have not been completed by the

initial end date and both parties feel it is beneficial then the relationship could be extended. The extension, as with the original phase, should have an end date agreed.

WHO CAN BE A MENTEE?

The single pre-requisite to be a mentee is the desire to learn a new skill or develop their existing knowledge.

A formal mentor will often be put in place when the mentee is learning a new skill or working on a task for the first time. It could also be used if an employee is deemed to be underperforming on a specific task or struggling to develop. A mentor will often be assigned to a new starter in a company to guide them through the general onboarding information alongside the formal training they are receiving. At this point, the role of the mentor is ensuring the employee has all the information they need to complete the training assigned, log on to the various systems they require and be a more informal point of contact than the new starters line manager.

It is important to understand that even experienced Programmers/ Biostatisticians can benefit from a mentor. As a Programmer or Biostatistician in a CRO/ Pharma, our roles are very technical and often require the use of specific tools and processes. When a programmer moves companies, there are likely to be new standards, tools and ways of working that they need to learn, irrespective of the amount of experience they have had in the past. Standardized programming tools are an example of this where most large CROs/ Pharma companies have their own standard programs to produce SDTMs, Analysis Datasets, TLFs and more. The training for these tools will likely be polished and provide clear examples but in use the programmer will take time to understand the complexities of the tool. This example is as relevant to existing employees as new starters. For example, a Senior Biostatistician could have extensive experience as a Lead Statistician and working from a SAP, but may never have authored one. Rather than taking on this task for the first time alone, a mentor would be able to have regular catch-ups throughout the process to answer questions and review some of the work to provide specific feedback.

Clearly, in the examples above, the mentee must be open to receiving the guidance and support of the mentor and avoid ego affecting the relationship. The first step in this is an appreciation of the justification for putting the support in place. If the mentee does not agree with the need for development in the specific area then progress towards the goals may be slow, or the relationship doomed to fail from the beginning. The Mentee must show some humility in accepting the support and guidance of a colleague. From the examples above, there is no need for the mentor to be superior in title to the mentee. For example, if a new programmer joins a company at a senior level, a junior programmer who has been at the company for one or two years with experience of using the company's proprietary TLF programming tool could be in a position to be the mentor. However, care should be taken during the assignment to ensure that the relationship will work from a social standpoint. In putting a less senior mentor in place, the mentee may feel their experience is not being appreciated. Part of the initial discussions should be to ensure that this is not the case and the create an understanding of why the specific partnership has been set up. In this instance, the mentoring could work both ways, with the more senior mentee also sharing their own knowledge.

WHO CAN BE A MENTOR

It has been covered above that the mentor needs to have a greater experience of the specific skill or task. However, beyond this they also must have the 'soft' skills to share their knowledge and develop the relationship. The predominant direction of communication is the mentor providing information and guidance to the mentee. It assumes the mentee does not yet have the knowledge to ask specific informed questions or know what knowledge gaps they have. As the relationship progresses, the mentor can begin to take more of a coaching role, asking questions rather than providing solutions, and encouraging the mentee to propose their own solutions. The mentor must be committed to the partnership and the goal of developing their mentee and be able to devote time to the mentee's development, preparing for the meetings and be available for further questions. A mentor should be capable of showing understanding of the challenges faced by the mentee and be non-judgmental. It is key that the mentee feels they can ask any questions they have and not fear they are being judged on them – there is no such thing as a silly question in this forum. A mentor must be confident enough to be open and honest. This is partly to build the human relationship with the mentee. If the mentor can show that they acknowledge their own weaknesses and show empathy in understanding the challenges faced, this will give the mentee more confidence that they can overcome them and succeed, like how the mentor has. The other part of honesty is to provide honest feedback when needed. If the mentee is not made aware of their weaknesses, then their opportunity to develop them will be limited.

WHO BENEFITS?

The mentoring relationship does not just benefit the mentee. A successful relationship will have benefits for the mentee, mentor and the wider company. Promotion of these benefits within the department will encourage more participation in the process and motivate others to volunteer.

Mentee
For the mentee, the most obvious benefit is the accelerated learning. Being able to go beyond the initial training, try out the skills or tools and report back to an interested and experienced individual for further advice will save a lot of time and hopefully avoid some common pitfalls. In turn this will help increase the effectiveness of the employee and hopefully their job satisfaction. Beyond this, setting up these formal relationships results in extending the mentee's professional network. Once the formal mentoring process is over, this network can remain and result in a closer connected team. If the mentor is a more senior figure in the department, it will also give the mentee more experience and confidence communicating with senior leaders. Although promotion cannot be guaranteed, people with mentors should show increased rate of progression within their company due to accelerated learning from the increased support.

Mentor
By mentoring, the employee is forced to further explore their own understanding of a subject. They may be encouraged to try to answer questions they have of their own. Also, by facing questions from their mentee from a different perspective than their own, they may learn new information. For the mentor too, there is the benefit of expanding their professional network. Not only to their mentee who will hopefully remain at the company and continue to progress, but also with the mentee's line manager. There is also a degree of self-discovery. From working with their mentee, it may become clear that they do not want to progress towards management and instead can tailor their professional development towards more technical challenges – Afterall management is not for everyone and is not the only indicator of a successful career. If they do decide they want to progress towards management, the skills developed directly through mentoring will be useful in their future career as a manger. Volunteering to be a mentor can be seen as a first step towards line management and is likely to gain the mentor greater visibility within senior management. Showing a passion for the development of others is a key skill that will increase the likelihood of further management responsibilities.

Company:
By partnering inexperienced team members with more experienced mentors, the company is ensuring that skills developed through experience are handed down to the next wave of programmers/ statisticians. This ensures that as people move up into more senior positions, the experiences gained over time programmer or using the company's tools are not lost. By encouraging this transfer of experience, the company can expect efficiency and productivity of their teams to increase. Rather than every potential mentee learning a new task independently and hitting similar challenges and working them out for themselves, the mentee has someone they can ask for guidance enabling them to learn from the time spent by others in the past. It also ensures the "best practices" for specific scenarios, which may not be explicitly outlined in formal training, can be followed by all rather than each team member developing their own preferred solution to a challenge. These relationships encourage a culture of development. It would be expected that people want to learn new skills and employees can see that joining with a mentor can assist with this. Providing these opportunities, both to the mentor and mentee, again drives empowerment, engagement and retention throughout the team. Relative to outsourcing training to other companies, the cost of running a mentoring scheme is low and so is an efficient route to training. The increase in communication within, or even across departments, encourages wider idea sharing and fosters productivity and performance gains.

HOW TO GET STARTED

In order for the goals to be specific, both parties must have a clear understanding of why the relationship is being put

in place. Initially this could be something identified by the line manager during one-to-ones or end of year performance reviews or an area highlighted by the employee. When a suitable mentor is being lined up the reason must be taken into consideration, along with personality types, previous contacts and availability. There are a number of questionnaires available online for prospective mentors and mentees to complete to assist in the assignment of a suitable pairing. Many of these relate to the more general form of mentoring for career development, rather than as I am proposing in this paper, but I believe the questions would be valid in this style of mentoring to ensure a good fit since we work with global teams and the mentor could be selected from any region.

Once the pairing has been decided on, both mentor and mentee should be informed of the assignments and the scope of the mentoring relationship. At this point, the mentor should also be made aware of any other factors deemed relevant, such as reasons why the mentor is required (especially if for past performance issues) and any specific challenges they could expect to face. This will allow them to prepare and tailor their approach.

The first meeting should be used as a fact-finding and relationship building experience. Again, there are a number of template agendas available for this to guide. The meeting should be led by the mentor, but sufficient time allowed for the mentor to provide a background and information about themselves and answer the questions of the mentee. Remember, this is a two-way relationship where honesty and buy in from both sides is crucial.

Beyond personal information and getting to know each other, the first meeting is also where the scope of the relationship is discussed. Important questions like how much experience do both sides currently have, where the mentee would like to be by the end of the process and what success should look like. At this point you can set out specific goals that can be reviewed at intervals throughout the process. It is important to understand how frequent the meetings should be based on how much time each participant has available, both for the interactions themselves, but also for the training/ work/ homework. If the mentee is busy on other tasks and only has a few hours per week available for development of the target skill, weekly meetings would not be an efficient use of time. However, if this is forming most of their forecasted work, more regular meetings may be needed. Discussing and documenting how adhoc contact should be made will also help the relationship harmony. If both are office based, asking adhoc questions at the mentor's desk might be acceptable but the mentor may feel this will interrupt their other activities too much and would prefer questions by email or even a shared OneNote, with more formal catch-ups to discuss the questions and answers. Likewise, if both are homebased, can technology such as video calling and or screensharing be used to help build a personal relationship and share information efficiently. All this information should be documented in minutes or possibly a "contract". This does not mean there is no flexibility moving forwards but setting out the ground rules early will help both parties and avoid unnecessary conflicts.

LINE MANAGER

Depending on the company/ industry, there are many different styles of management. The autocratic style of management targets high productivity by use of power and authority to dictate the activity of the team. The manager is essentially accountable for the success or failure of a task and as such, expects their instructions to be followed without question. The result is a team who become one dimensional. They can accomplish a task but are not required to show decision making, take accountability or act with autonomy. The style sees employee seen as an asset to be used in the pursuit of a single goal, rather than to be developed and increase the value of. This may work in industries with low skilled labor or the need for fast actions under pressure but has severe limitations in technical industry.

A manager using this style of leadership will spend more time in one-to-ones talking and telling their direct reports what to do or how to do tasks. If there are issues, they will tend to resolve them themselves and oversee the details of the work closely. Since this style of manager is more responsible for the work, discussions will focus on the outcome and if not achieved, may spend more time analysing what went wrong rather than what can be done in the future. This style can have the result of de-motivating a workforce reducing productivity and reducing retention due to its micro-managing and controlling nature.

The coaching style of management targets development of the employee's skills and potential. Much of a manager's time will be spent supporting their team through one-to-one's and as an advisor. The manager needs to build the trust of their reports through these meetings. Discussions should be focused on the future rather than dwelling on what has gone wrong or asking for explanations. It is necessary for the manager to listen to the employee and understand where they want to develop rather than tell the employee what they need to do. A manager will understand the challenges being faced by the employee and work to identify pathways enabling further development. A good coach is supportive and patient, creating a positive and growth focused relationship. It is still important to have an honest relationship. The manager should receive, or seek out, specific feedback from the employee's colleagues, study leads or mentors to identify their strengths and weaknesses. Clear communication with their employee to discuss these is crucial to agreeing future actions.

A manager preferring a coaching style will provoke self-development through directed questioning to reach the cause of issues and empower the employee to suggest solutions. They will spend more time listening to their report rather than talking. It is important that the relationship between the manager and report is open and honest. Humility on the part of the manager, accepting they do not know the answers to everything, helps to develop this trust. Unlike the mentor described above, it is not imperative that the manager can problem solve for their direct report or provide instructions on specific tasks. They may not have performed the task recently or be up to date on the latest processes. They should be comfortable acknowledging this but also able to be relied upon to put the report in contact with someone who does (i.e. A mentor).

From experience it is clear there are situations in line management that require a variety of styles. Empowerment of a team is key to them becoming accountable for their own development and the role of a manager is supporting them on this. Not everyone is motivated by the same career pathways or incentives and it requires a different approach for each report to ensure they can make the most of their abilities. For this, the manager and report need to be able to have open discussions where the report can express what they want, and the manager is comfortable listening. A manager should ask questions to ascertain the level of progress of their team on the tasks they are assigned. However, there are also times when a different style is required, and the manager may feel the need to offer their own opinions and solutions or provide directions if it is felt the report misunderstands or is heading in the wrong direction. They should also actively reach out for feedback on their reports from study leads or colleagues and discuss this openly and honestly with them. Where feedback is negative or constructive, since the feedback is second hand, the manager should take care to understand both sides of a conflict and not take sides. Where a weakness has been identified, discussion should aim to be forward focused, asking the report what they would do differently in future to improve the outcome rather than dwelling on what went wrong the last time. For someone to learn and move forward the manager needs to empower them and build their confidence, otherwise they might not want to try new things.

SUMMARY

This paper has outlined the different types of support and development that both the manager and mentor can offer, and aimed to justify the use of both. It is clear that many of the communication skills cross over and that success as a mentor can be an indication of potential in line management. However, it is important to understand that the specific goal of the two roles does differ, and the types of communication will also vary. The managers primary objective is to improve their reports performance by offering support and encouragement along with guidance at a high level with the aim for the employee to take greater ownership of their own development. The manager must build their employees trust be being available, listening, providing honest feedback. Direction is offered by targeted questioning, encouraging the report to join the dots in their existing knowledge (assuming the employee already has the core knowledge). Emphasis is on avoiding micro-managing. The line manager does not need to be an expert in the role or specific tasks the report is undertaking. They should understand the direction of the company and department and aim to develop the employee in the direction of the company's needs. The mentors focus, at least initially, is on sharing their knowledge and providing information on a specific task on which they are highly experienced and knowledgeable. It assumes the mentee does not yet have the knowledge to find their own solutions. There is still a clear need to build the trust of the mentee, but this is done through displaying a clear understanding and experience of the identified skill or tool. Beyond the required knowledge, the skill of the mentor is to provide the information in a suitable format for the audience. Much like when presenting to a group, it is important to be able to adjust the delivery of information in order to not confuse a mentee with no experience, but not to over simplify when not required. Missing this balance will frustrate and demotivate the mentee and offset the benefits of the relationship.

In order to successfully retain and upskill their workforce, a company must take a holistic approach to personal development. This must involve the empowerment of their staff to take responsibility for their own development while providing targeted support where required. By encouraging the managers to take a coaching role and avoid micro-management, they can concentrate on identifying opportunities for further development and support the wider needs to their employee. The assignment of a mentor for guidance on more specific day to day tasks can allow the employee opportunities to learn and develop away from their manager. It allows people with expertise in a specific file to impart knowledge and widens the employees professional network.

The role of a mentor is one that should be encouraged to be taken by a variety of different members of a team and the mutual benefits touted. For the mentor there are numerous benefits, including visibility to management, early experience of management, reducing their own workload by training the next generation.

For a company, the benefits of separating mentoring from line management has the benefit of developing their employees social and professional networks. The relative cost of this method of training is low when compared to outsourced training companies and the opportunities provided to both mentors and employees will further increase job satisfaction.

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