



Making Connections through non-traditional mentorship,  
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**Michael Tatonetti:** Hello, and welcome to our next session of Surge Connect on non-traditional mentorship. My name is Dr. Michael Tatonetti, and I am glad to be here today, along with Victoria, Emilio, and Jean-Guy. Let's begin by introducing ourselves, what we do, and how participants can stay in touch with us after today's session.

**Victoria Taylor:** Hello, hi, everyone. I'm Victoria Taylor. I'm the Executive Director of an association in the Australian rice industry, and I'm currently, among other things, a board member of an association in the Australian dairy industry. And I am on LinkedIn, but you can also find me on Twitter @VLTaylor.

**Michael Tatonetti:** Great. Emilio?

**Emilio Arocho:** Hi, I'm Emilio Arocho. I work with the National Association for Healthcare Quality out in Chicago, Illinois. And I also serve on the board of directors for the Nonprofit Technology Network. You can find me on LinkedIn under my name, Emilio Arocho, and also my website, [emilio.tech](http://emilio.tech).

**Jean-Guy Talbot:** Hey, so my name is Jean-Guy Talbot, it's a French name. And so, I'm an accountant and I started my own practice, about, almost 30 years ago, starting from my basement with no employees, no nothing, and grew the practice to now close to 60 employees.

And since about four or five years ago, I started a second company called Haven New Practice Management and that company mentors other accountants with their practices. So I'm using all the experience that I've gathered over the last 30 years to help other practitioners not suffer the pains that I suffered in growing this practice. So I can be reached through both my website, [talbotcpa.ca](http://talbotcpa.ca) or [havennewpracticemanagement.ca](http://havennewpracticemanagement.ca).

**Michael Tatonetti:** Very good. And my name is Dr. Michael. I am the Director of Certification and Education with the Professional Pricing Society. And you can find me on LinkedIn at Dr. Michael Tatonetti, or I blog on association leadership content at [michaeltatonetti.com](http://michaeltatonetti.com).

So as we talk about non-traditional mentoring today, mentorship does not always have to be top down and instead we can find mentors in other industries, other cities, other age groups and demographics, and even career paths. So the first question that we wanted to tackle today is, how would you define non-traditional mentoring and how is that different from how we perceive traditional mentoring?

**Emilio Arocho:** I think mentoring is a little bit... The difference between it being traditional and non-traditional, I think I've started to think of mentoring as more of a mindset that I bring as a leader to every situation. So I think that's a little bit non-traditional.

I think having a mentoring mindset is a great way to attract and retain talent to an organization. If you can give prospective candidates or people you would like to work with an impression that you are not just concerned in coaching them on the immediate skills they need to do their job, but that you're invested in them as a professional, I think that comes across really well. And I think that's a great way to entice the right people that you want to work with at your organization.

And I also think of mentoring as an opportunity to really amplify underrepresented voices that are out there, both from learning about those voices as a leader, by working with these people, but also providing them support.

**Jean-Guy Talbot:** Well, what always amazes me is how people, without any experience, no knowledge, can teach me as much as they do. And I never have mentored anybody and not walked away thinking, boy, I've learned a lot from that person that I'm mentoring. So I think it's a matter of keeping an open mind. And just because someone is young, may come across as being almost foolish, they are probably doing things that you never thought about doing that I think is worth keeping an open mind to.

**Victoria Taylor:** I think that era of the mentor being the career parent, if you like, the older, wiser, senior person, usually within your organization, who provides encouragement and support and takes an interest in your career development, is over. You pick your high potential people for those sorts of programs and you leave them hanging without a pathway for that person to then move into a leadership position. It's a lot of resources for both the mentor and the mentee for something that doesn't have great impact.

And I think all the relationships that Jean-Guy and Emilio have just described are the way that we're going now. It is about reciprocal mentoring, reverse mentoring, and I think today it's about how can associations facilitate that kind of mentoring for their members and their industry more broadly.

**Michael Tatonetti:** I love that, Victoria. And I think that that speaks to how transient careers are, that we're no longer with the same company for 30 years, and therefore learning from those who are higher up in how to do their job, with people moving jobs every few years, typically, I think everybody brings a unique skill set and they're very transient and therefore they're sharing what they've learned from other companies and also getting what they can from that company.

And I agree, I think that associations have a great opportunity here to facilitate dialogue and best practices amongst members, regardless of age or years of experience, to really grow the knowledge base, especially as so much content

becomes free and online. There's such an opportunity for people to learn in a nonlinear way. So that's fantastic.

So I would love to hear next, what ways are each of you seeing mentoring relationships evolve now in this way, through associations. Maybe what systems are in place? What are some great things that you've seen, either from associations or even from affiliated businesses that work with associations to help foster the sharing of knowledge and mentorship, regardless of it being top down?

**Emilio Arocho:** I can definitely think of some great examples I've observed and been a part of with mentoring relationships organically springing out of peer review groups. And so associations, association staff, might get an opportunity to network and connect with other association professionals from services like Sidecar, for example, and then also from different providers who provide services to association customers.

Their peer groups are a great opportunity to network and get to know people. And I've actually observed a lot of those times, mentoring relationships spring out of that. So if my organization, from a technology perspective, leverages an AMS, and I have an opportunity to network with other associations that also use that AMS software, there might be people in that group that are CTOs or CIOs, and there might be Directors, and there might be managers, and that cross pollination that happens when we have a really engaged association community, and when I say community, I mean beyond just people who work at associations, I mean people who provide services to associations, and consultants, and all of it, when we get together and we convene, I think that's that cross pollination is a great opportunity for non-traditional mentoring opportunities to come up.

And it's a really great experience when it happens organically, because you're learning from someone and you really respect them, and that mutual relationship turns and blossoms into something really valuable.

**Victoria Taylor:** I think even if you are in a position where that organic relationship isn't as natural or there's barriers to that, I think it can be, to an extent, designed by an association. So I've seen great examples, particularly in that professional association. We know our younger members, if we can get younger people to join, they're looking for impact, they're looking for experiences. And so being able to match them through what might be called a volunteering program, so they're taking their professional services to a charity or another not-for-profit to perhaps mentor them, whether it's accounting or something like Jean-Guy does, then there's that almost reverse mentoring that the younger person is perhaps teaching the more established person their skills.

But in turn, which goes to Emilio's point and Jean-Guy's, that where the young person's actually getting that career advice as well. They're looking at pathways, they're looking at how they can perhaps get their career to where this person's is. And I think we also know that young people today find those traditional mentoring programs a bit slow for their career needs. They do want to progress faster. So by

facilitating an opportunity for these young people, that then may evolve into something more organic, perhaps when they're in place, I think is something that we can do to try and facilitate those outcomes.

**Jean-Guy Talbot:** Yeah. Something I've noticed. I find that millennials get a really bad rap for being... Well, you know as well as I do what they're getting a bad rap about. But I guess my experience, if you were to look at my team here, the average age at this firm is something like 25, 26, or something like that. It's really, really young. And the reason it's this high because of me who brings the numbers up. So we've got a really young team here.

And what I've discovered is that the younger teams are probably hungrier than even we were in learning. For them, it's not as much as people think about making the big bucks as it is about making a contribution to feel as if they're worthwhile. And so with all that, I find that they are hungrier for mentorship than I think my generation possibly was. So as much as they're getting a bad rap, I have a certain amount, a tremendous amount, of respect for the millennials in their hunger for knowledge.

If you can get the right people. Obviously, they're not all like that. I'm being very journalistic. But by and large, I've had tremendous success in attracting young people who are just hungry as hell to be mentored. And I don't think there's anything more fun than mentoring someone who's hungry for the knowledge.

**Emilio Arocho:** That's a great point Jean-Guy. I just wanted to add onto that and say, I think, as someone with a technology background, I think there are so many assumptions that people bring to millennials as a category. And I think it calls on leaders like us to really challenge our own internal biases when we evaluate potential mentees. And when we try to gauge people for their hunger or their desire to be mentored, especially in the situation we're in now, it's possible that they may not be coming across as receptive or grounded as people typically would because there's so many difficulties. We all have to deal with the current era that we live in. And so I think that's a really great point that there's preconceived notions that we have out there and we have to challenge them and be open to being wrong about them in order to benefit from the value that people have to offer us despite their age or their demographics.

**Michael Tatonetti:** Yeah. That's great. And one thing that I've noticed on the flip side is that while millennials and Gen Z are very purpose and meaning driven, I think that Boomers and Gen X want as well to feel like, hey, I've built up this career and I have this knowledge and I want to share it. I want to make sure that you learn from the mistakes that I've made and learn from the successes that I've had.

One thing that I love that was just brought up was when Victoria brought up the idea of these quick mentoring needs. And what that made me think of was within our own association, one thing that we found is most people don't want traditional programs where it's a one year. Some do, but it's very rare. We have about 5,000

members, and in the last year I've only had one person request a formal mentor over a longer period of time.

Typically, what I'm finding is that people have a short goal. They say, I need to know more about this. Who can I speak to? And they'll come to us and say, who is in the membership? We also have discussion boards in our AMS and so we can facilitate it in different ways. But typically when they come to us, they're saying, I need someone who I can talk to once or twice about this and learn a bit more.

And so I think associations also have a great opportunity for almost micro mentoring, where there are some specific topics. And that also made us start adding to our member profiles where members can select... We created about 15 to 20 different areas of specialization that we found were common for our field and we allow them to check off, so that when people are searching the directory, if they want someone that has great pricing analytics knowledge, or competitive research knowledge, they can seek someone out and connect with them on LinkedIn. So that's been a pretty interesting shift, I think, for it.

So let me ask you guys this next, what are some things that you should be looking for in a mentee? What are some things you should be looking for in a mentor? And how do you set those boundaries of the relationship, the expectations, of what that mentoring relationship is going to look like?

**Jean-Guy Talbot:** When I look for a mentor, and something I failed to share is that in growing my practice, I'd say that a really good portion of the success I've had with my practice, because I did have a mentor. And one of the reasons the mentor worked so well for me is twofold. One is, he had the same core values as I do. And I find that that too often is ignored. When people are looking for a mentor, they're looking for people with the education and the knowledge and the experience, but they fail to really look at, does the person have the same core values as I do? Does the person want the same things out of life as I do? Do they believe in the same things that I do? Because if you're not on the same page, my guess is the relationship will eventually fall apart to some degree, because the mentor may guide you in a direction that you're not at ease in doing, because they don't have the same belief system as you do.

And the second thing I tend to recommend when people ask me what I should be looking for in a mentor, is just make sure you've got the right core values, and then the second thing is, look at their past history. I've seen a lot of people who do a lot of counseling, who do a lot of mentoring, but have not lived a whole lot, so all of the mentoring is done based on what they've learned in books. I always have a problem with that because I find that most of what I'm teaching as a mentor are things that I've learned through hard knocks that are not taught in books or not taught well. There's nothing like really getting beaten up and spitted out and thrown into the street to really learn, okay, these are the things that I need to learn and do better. And until you've been really beaten up, I don't think you can contribute quite as much as someone who has been beaten up in a big way.

So I tend to say, look for those two things. Is... look at their past history. What success have they had? What have they lived? And do you think they have something to contribute based on that? And look at their success. If they're successful, odds are they have something to share. And sometimes when I see mentors who have accomplished nothing, I say, well, not to say they've got nothing to offer, but if I were me, I'd be a little bit more careful in selecting them as a mentor.

**Emilio Arocho:** I really like that idea of the core values being a similarity that's required. And when I think about the mentoring relationships I've had on both sides of the table, there's always been a shared core value of mission orientation.

So you have mission-minded people throughout our sectors. You don't have to work at a not for profit to be very mission oriented and to want to be of service. But the people that I've had productive mentor/mentee relationships are people that believe in a higher purpose outside of themselves and are eager to get to work on that mission.

So that might be something that's particular to me, that might be a value that I have, that I've bonded with and had productive mentor/mentee relationships with people who have that same core value. But it's definitely something I've observed with the people that I've worked with. It's just one of those critical things that's just been so important to have in common to develop rapport and trust and to be aligned on the purpose of the mentoring relationship.

**Michael Tatonetti:** Yeah, that's great. I think that one thing that I look for when I'm looking at a mentor, to echo what Jean-Guy said, is I'm looking for someone that I'm drawn to something in what they've accomplished or what they've done, or the way they do it, their attitude, their, again, values being a connection. There has to be something there where I see something in you that the way that you do what you do and why you do what you do, I'm drawn to that.

Because there are many successful accountants, there're many successful association executives, and tech pros, and every industry, but who do I want to be like, and what do I want my future to be shaped like? I think that that's a critical thing to consider.

And then I look for that as well if someone asks me to mentor them. I'm even more picky when someone asks me to mentor them, because some of my immediate thoughts are, why? What are you hoping to get out of this? I need you to set clear expectations of what would success look like in our mentoring relationship. How much access? How much time? And if they can't communicate that, I'm really not interested because I can't do all the lifting as the mentor. I feel that the mentee needs to do most of the lifting there.

Not that I don't get anything out of it as a mentor, I love to mentor, but I need you to be able to clearly articulate what you need from me so that I can commit to it or set other expectations as needed.

**Emilio Arocho:** I'm definitely learning a lot about a speaker named Simon Sinek and some of his writings on business and leadership. And one of his concepts is the idea of the worthy rival. So someone who you're not in direct competition with in your work, but someone who inspires you to reach further because of their accomplishments or their skills.

And I definitely have cases in my career where I've identified people who are hugely inspiring to me, and they're almost my mentors without them even knowing it. So we may have spoken, we may have had exchanges where information was relayed, knowledge sharing occurred, but there's a piece of me that is monitoring what's going on in their world, and admiring it, and respecting it, and learning from it, even though they might not even be consciously aware that they're serving in something of a mentor relationship to me. And some of those relationships, they're not even really relationships, but some of those worthy rivals have become mentors, just as things have progressed over time. I've gotten to know them or we've developed a rapport. That's been a way for me to identify people who are, to Jean-Guy's point, doing things I really respect and really accomplishing a lot, and still learning from them before a mentoring relationship sprouts out of that.

**Victoria Taylor:** I think that's a really important point because if we are going to think that the only person that can mentor us is someone that we are linked to, matched within a formal program, we're going to miss a lot of fantastic advice and support in our careers. Because I also have a casual board of advisors, I guess, and they would not know that they are mentoring me, but they are people that I go to for advice and help, and just to shoot the breeze on particular issues.

**Michael Tatonetti:** What are ways that you can see the association pros who are attending this summit walking away and facilitating maybe the micro mentoring that is non-traditional, maybe it is a more formal mentoring path, but what are some ways that they can incorporate some micro, non-traditional mentoring into what they're offering to their members?

**Emilio Arocho:** I think one thing that associations can think about is what do you know about your members to begin with and does that data naturally push you in a direction or a way of considering structuring additional mentoring programs?

So I can speak for my organization. We've been developing these different methods for really understanding our members, not just in terms of what their job title is or their level of seniority, but understanding the practice areas of their profession. And we've been doing that for our own product offerings and our own product development purposes, but that's data that's rich for insight in potentially matching people who are well suited because of the work that they do in their job for a possible mentoring relationship.

So I would say associations, if you're thinking about more burst formatting for your mentoring offering or developing mentoring offering for the first time, take a look

at the data and see what you know about your members and how that information could be brought to bear to help you make educated guesses about who might be well suited or what segments of your population you want to engage with on a micro learning mentoring effort.

**Michael Tatonetti:** One thing that we're really looking at is making sure that we're adding and communicating the value. And a few ways that we're doing that specific to mentoring, we just recorded our first live online course today. Normally those are done on demand and this way we know that the video's good, there's no tech hiccups, and we upload it for sale.

But we had a sponsor because we had to cancel our event, one of our annual conferences, in April. We had a sponsor say, we would like to move those dollars to making an online course and inviting 100 people to attend for free. And by doing the live course, people could ask questions in real time, get mentoring on how they are doing their pricing during this crisis that we're in. And I thought that was a huge value add for them.

It was a quick micro mentoring opportunity. It's something they would do anyway, which is taking a course or content from us, but by adding that live component to it, it really drove up the value. And we made it open to members only. The first X amount that we had seats available for. So that was a huge add because we normally charge about \$500 for an online course. So we gave away... The sponsor paid for that. But that became a huge, huge value add.

And I saw a lot of mentoring. We had so many questions because people don't know what's going on right now and we're all figuring it out for our own industries.

What parting thought would you want to leave with our association pros to challenge them, to stretch them? What would be a takeaway that you would love for them to consider and ponder as they walk away from our session today?

**Emilio Arocho:** Well, I would say, given the realities we live in, the COVID-19 and the financial implications which will shake out over the coming weeks and months, I think mentoring is actually more important than ever. We're dealing with people who may have less opportunity and financial access to traditional professional development. And I think the silver lining in all of this is that we have the buy-in from our associations and from our members to do things a little bit differently.

**Jean-Guy Talbot:** I would have to say that maybe too many organizations, and whether it be for-profits or not-for-profits, do view mentoring and education and all of that, as a cost. It's not a cost. It's an investment. It's an investment in the future. And it has a tremendous rate of return on your investment.

**Victoria Taylor:** I don't think there's anything to add. We're about people. We're mission driven. We're here to support the people in our organizations and our membership and our broader industries. And what can we do to support them at this time and into the future is probably the only thing I could add.



**Michael Tatonetti:** During this time where we're all at home and missing connectedness and feeling a bit crazy in our work, I think that one of the things that associations can provide is not just knowledge and updates on how it's impacting the industry, but connection. That when you can connect your members, again, informally through wine events, webinars, just shoot the breeze, use whatever tech you have. You don't need to invest right now in a brand new AMS that can do all these great things. Just use Zoom. Just use a Facebook group. Use LinkedIn and post videos. Use a LinkedIn group. Et cetera. Use what you have, but connect your people, give them space to talk amongst each other.

The knowledge is there, you just have to facilitate a day, time, and a platform for them to congregate within. I think that if we can do that right now, that would be a really, really powerful thing that they will value and remember well after COVID-19 is over.

Well, we appreciate all of your time today for joining us, and we really hope that you got something so that you can have non-traditional mentoring grow within your own association. Thank you for joining us today and we look forward to seeing you again.