



In partnership with

**equitory**

# Mentoring Programme Pilot 2021

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Programme Overview/January 2021

# Agenda and Speakers

- Welcome and introduction  
Laura Hayter, CEO, IR Society
- Welcome from Equitory  
Clara Melia, Founder, Equitory
- Benefits of Mentoring  
Rob Gurner, Head of Investor Relations, Plus500
- Programme Overview  
Fiona O'Nolan, Associate Director, Equitory  
Robert Dann, Head of Marketing & Operations, IR Society
- Q&A

# Welcome and Introduction

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Laura Hayter  
CEO, IR Society

# How can mentoring help my IR career ?

- Mentoring is essentially about helping people to identify and achieve their goals more effectively, both in a personal and professional capacity.
- Mentoring gives insight into the different routes mentees could take to achieve their career goals.
- Mentoring helps to develop the capabilities and skills needed to succeed in a dynamic, global economy.
- Mentoring will help expand your IR skills and knowledge to benefit themselves and their organisation.

# What are we trying to achieve?

- To provide a support mechanism to help IR Society members achieve their career ambitions
- Connect our member network further, creating more member advocates
- Delivering value to our members
- Give something back to the growing IR profession
- Pilot programme to understand demand and gather feedback to help develop the offering in the future

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# Clara Melia

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Founder, Equitory

# Benefits for the mentee

- Increased self-confidence and motivation
- Support and challenge in formulating a clear sense of personal direction
- An opportunity to develop skills by observing others
- A source of knowledge and experience to tap into
- A sounding board to discuss ideas and approaches before action is taken
- An opportunity to think about things in a different way

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# Rob Gurner

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Head of Investor Relations, Plus500



# Benefits for the mentor

- Unique opportunity for IR-specific mentoring
- Provide career advice and guidance, based on past experience
- Help to develop next generation of IRO's
- Learning and development from the process
- Opportunity to give something back to the profession

# Programme Overview

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Fiona O'Nolan, Associate Director, Equitory

Robert Dann, Director of Marketing & Operations, IR Society

# Overview of the pilot programme

- Aiming to facilitate **c15 mentoring pairs** during the pilot
- Six-month duration - **March-September 2021**
- Open to **UK-based, corporate IRO members**
- **Virtual-only** mentoring programme
- IR Society & Equitory available to provide guidance and support throughout the programme

# The Pilot Timetable

January 2021	Application forms submitted 29 January
February 2021	Matching process completed Introductions made for successful matches by email Mentoring pack sent to mentoring pairs
March 2021	Mentoring programme begins Initial meetings held to determine compatibility and to set mentees' Individual Development Plan (IDP) Format and frequency of mentoring meetings agreed
April - September 2021	Programme continues with regular monthly meetings Additional contact between mentors and mentees as agreed by the individual mentoring pairs
September 2021	Formal programme completed Mentee's IDP completed Mentor and mentee provide feedback on the programme

# Key matching criteria

1. Years of experience in the profession
2. Career level
3. Business sector
4. Competency areas
5. Areas for mentoring support

✓ Time taken on your application form will improve chance of a successful match

# Getting started

## Initial Meeting

- Opportunity to get to know your mentor/mentee, and agree the basis for the relationship
- Explain the purpose of the mentoring relationship, agree the format and frequency of the meetings and how these will work,
- What you will commit to and your role, what is expected from mentees and their role
- Ideal to do 'meet' informally and over video for a 'chat'

## Individual Development Plan

- Key document to establish the scope of the relationship and key objectives
  - Discussing professional and work issues
  - Agreeing what support is required
  - Exploring the options open to the mentee
  - Coaching on specific skills
  - Supporting the mentee to set achievable realistic and stretching action plans
- Will provide structure to monitor progress during the programme

# Making it a success

- Use your **Individual Development Plan for each meeting**
  - Have a clear structure and purpose. Before the meeting consider the structure and the time parameters. These should be agreed during the initial meeting when you are contracting with the mentee. Having a clear structure and purpose in mind will be the best and most effective use of your time and their time.
  - Think about the content of the meetings. There should be a balance of looking back and reviewing the mentee experiences and reviewing if objectives set have been met or, if not, why not? There should also be a balance of discussing current issues and thinking about the future and ensuring the mentee sets realistic objectives for their action plan.
  - Keep to dates and times set. It is easy to let the day job get in the way but try to focus on the benefits to everyone (including the organisation) of engaging in this process. Give it the priority it requires to be successful.
- **Get the most out of the experience!**

# What makes a good mentee ?

- Feel motivated and empowered
- Be proactive
- Take on board feedback and direction
- Be open and honest, maintaining confidentiality
- Put quality time into your Individual Development Plan
- Set clear and realistic outcomes
- Enjoy!



# What makes a good mentor ?

- Develop mutual trust and respect
- Value the mentee as a person
- Maintain confidentiality
- Listen both to what is being said and how it is being said
- Help the mentee solve his or her own problem, rather than give direction
- Focus on the mentee's development and resist the urge to produce a clone

# How to apply

1. Read the Mentoring Charter
2. Listen to our training webinar for mentors and mentees
3. Complete the online application form on our website by **Friday 29 January 2021**

# Resources and support

We have a number of supporting documents on the mentoring pages of our website at [irsociety.org.uk/careers](https://irsociety.org.uk/careers):

- BENEFITS OF MENTORING & THE MENTORING PROCESS
- PILOT PROGRAMME OVERVIEW & PRESENTATION SLIDES
- MENTORING CHARTER
- GUIDELINES FOR MENTORS
- MENTORING PROGRAMME FAQs

For further information or any questions please contact [mentoring@irsociety.org.uk](mailto:mentoring@irsociety.org.uk)

# Contact Details

Robert Dann

IR Society

[mentoring@irsociety.org.uk](mailto:mentoring@irsociety.org.uk)

Fiona O'Nolan

Equitory

[fiona@equitory.com](mailto:fiona@equitory.com)

**Thank you**

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