



# Skill Card & Assessment Criteria

IO3

Stage: Final Version

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## 1 - Requirements for Business Mentors

The certified Business Mentor shall meet requirements in terms of prerequisites, and competences.

### Prerequisites

The Business Mentor shall meet the prerequisites specified in the following table for the respective certification level.

Topics	Requirements	Junior	Senior	Master
1. Graduation	business related degree	Yes	-	-
2. Credential	coaching credential delivered by either: i. International Coach Federation (ICF): Coach credential ii. European Mentoring and Coaching Council (EMCC) - Coach Practitioner qualification	-	Option 1	Option 1
3. Training	business mentor specific $\geq 30$ hours training delivered by one of the MentorCert partners	Yes	Option 2	Option 2
4. Work Experience	Years (y) business experience	$\geq 2$ y	$\geq 5$ y	$\geq 5$ y
5. Mentoring experience	Business mentoring missions (m) in the last 2 years	$\geq 3$ m	$\geq 5$ m	$\geq 8$ m
	... of which missions (m) alone or under control of a referee or certified business mentor	3m		
	Business mentoring missions (m) in the last 12 months	$\geq 2$ m	$\geq 3$ m	$\geq 3$ m
6. Mentoring evidence	complete and auditable folders (f) providing evidence for business mentoring relationships in the last 2 years, including e.g.: - Business mentoring contracts,	3 f	4 f	5 f



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	<ul style="list-style-type: none"> <li>- Business assistance or consultancy contracts,</li> <li>- Template with mentoring missions,</li> <li>- mentees' information and their agreement to be contacted (phone or mail);</li> <li>- audios and videos</li> </ul>			
7 Peer assessment	assessment of the 15 key competences (see below) in business mentoring missions (m) by a referent or certified Business Mentor within the last 2 years	≥ 3 m	≥ 2 m	≥ 1 m
8 Code of Conduct	Signed Business Mentor Code of Conduct (to be set-up in the Certification Scheme (WP5))	Yes	Yes	Yes

## 2 - Business Mentor Competence Matrix

The Business Mentor competence matrix specified below

- is structured according to the PDCA cycle (Plan, Do, Check, Act) applied to the mentoring process,
- encloses 15 key competences (numbered 1 to 15) for which evidence shall be demonstrated, whereby

PLAN – Preparatory phase

### 1. Know and apply strategic orientation/planning and value creation models

- a) analyse market needs related to the mentee's activity: scale and scope of the sector, opportunities, threats, competitors
- b) understand options available to map the sector eco-system and apply at least one
- c) define hypotheses about the future of the sector
- d) identify relevant value creation models and apply at least one
- e) help the mentee to set up a long-term business development plan



## 2. Establish the relationship

- a) prepare the 1st contact meeting: where? when? information on the mentee and his business
- b) create a psychologically safe environment for the mentee, with a client-centred approach
- c) explain the mentoring relationship to the mentee: what it is, the benefits and what it is not (coaching, consulting)
- d) communicate on ethical issues: present the rules of the mentor Code of Conduct and how they will apply during the mentoring process

## 3. Analyse mentee's needs

- a) identify the mentee's project needs: various issues and concerns, and ability of the mentor to help resolve them
- b) support the mentee in identifying his/her needs
- c) structure and adapt the mentoring process, whatever the mentee's needs (e.g. business, technical, emotional, social support)
- d) identify the necessary resources to realise the mentoring process (e.g. specific contacts, network)
- e) know when to refer the mentee to someone else: mentor, or other

## 4. Determine objectives and select tools and methods to achieve them

- a) determine realistic and measurable objectives, coherent with the mentee's context and business sector
- b) master a representative and adequate range of management and quality tools
- c) structure and adapt the mentoring framework of intervention, using the appropriate to the mentee's needs processes, instruments, tools (e.g. business, technical, emotional, social support)
- d) plan the mentoring process accordingly with correct timelines, milestones and review points.

## 5. Set-up a mentoring contract

- a) propose, revise and agrees with the mentee a clear understanding on a framework for mentoring intervention that includes: the general approach, the scope and the limits of the intervention, in a client centred approach that takes into account both the business and personal long-term interests of the mentee
- b) agree with the mentee on the mentoring relationship and the responsibilities of the mentor and the mentee during the process.
- c) verify that the mentoring process matches the mentee's expectations
- d) set up a mentoring contract according to a given time frame and budget



DO – Facilitating phase

6. Analyse, assess and help improving the applied management practices:

- a) know the missions of a manager: anticipate, decide, organise, lead (animate), communicate, resolve, perform, pilot and the techniques associated
- b) identify with the mentee which practices, methods or tools need to be acquired or improved
- c) transmit adequate management methods, tools and techniques to the mentee or help choosing appropriate experts

7. Support effectively the mentee and facilitate success

- a) use and adapt language appropriate for the mentee and his/her situation
- b) listen actively by asking open questions, by reformulating, by giving and receiving feedback: in order to understand his/her needs, ideas, underlying concerns
- c) identify and adapt to the changes in motivation of the mentee
- d) demonstrate empathy (and make the difference with sympathy)
- e) recognise and work with the mentee's emotional state
- f) adapt the approach to suit the different ways in which the mentee learns
- g) facilitate the learning process: helping the mentee to grow through his/her own strengths and recognize his/her own developing areas
- h) help the mentee to evaluate and integrate the different information sources
- i) transfer knowledge and experience to the mentee
- j) help the mentee create an action plan
- k) guide the mentee to use experiences effectively
- l) support the mentee to identify his/her own possible solutions and express them
- m) use "Project based way of thinking" skills

8. Progress the relationship

- a) build a trustful relationship based on communication and respect
- b) review regularly progress and redefine goals, objectives or direction
- c) help resolve project or relationship challenges as they arise
- d) demonstrates ability to develop a process to suit the situation
- e) support the mentee in change
- f) encourage and celebrate the successes
- g) ensure mentee follow up between the meetings: mails, phone calls
- h) know and comply with the main ethical behaviours expected from a mentor



9. Closing the mentoring process

- a) identify when it's time to close the mentoring process
- b) organise handing over and sustainable application of all applied tools and methods
- c) validate together with the mentee the end of the mentoring process
- d) decide to provide follow up if needed

CHECK – Evaluation phase

10. Evaluate the mentoring process

- a) plan and apply appropriate evaluation methods (e.g. questionnaires, observation) to evaluate the mentoring process.
- b) assess all phases (i.e. preparatory, facilitating & closing) of the mentoring process using the ground rules agreed at the start
- c) optimise all the phases of the mentoring process based on the evaluation outcomes
- d) communicate relevant assessment outcomes to the mentee and provide adequate recommendations for further development.

11. Evaluate the mentoring outcome

- a) document and report the achieved outcomes
- b) compare the achieved outcomes with the initial objectives
- c) analyse current learning about the outcomes and the factors that may have led to those
- a) outcomes or would lead to improved outcomes
- d) optimise the mentoring process based on the evaluation outcomes
- e) propose a plan for sustainable improvement

12. Evaluate the mentee's progresses and autonomy

- a) follow regularly with the mentee the evolution of his (her) management practices
- b) assess mentee's autonomy, self-confidence and lived learning
- c) apply relevant formative and summative assessment methodologies for assessing the mentee's acquired outcomes
- d) ensure that the mentee self-assesses his (her) learning and experience outcomes in terms  
of autonomy, self-confidence and lived successes
- e) conduct a debriefing of assessment outcomes with the mentee and provide adequate recommendations for further development



13. Evaluate the mentor's performance

- a) self-assess their own mentoring performance and their own behaviour as a mentor (e.g. analyse communication processes, personal communication patterns).
- b) get a documented mentoring performance assessment from the mentee and, if any, from other stakeholders
- c) be involved in mentors' networks / communities of practice, in order to benchmark and exchange experiences with peers.
- d) debrief the mentoring performance assessments with the mentee

ACT – Improvement phase

14. Adjust the mentoring plan & outcome as necessary

- a) revise the objectives and action plans to achieve them as necessary and justify the changes
- b) propose and mutually agree timely appropriate actions to remediate as necessary based on the assessment results
- c) involve the mentee in the remediation plans
- d) advise the mentee for enhancing his autonomy and applying for targeted trainings

15. Improve the mentoring practices

- a) identify their own strengths and areas for improvement as a mentor
- b) organise their own professional development (also in the long-term) and plan actions for improving their mentoring practices according to the assessment result
- c) manage their own learning process and participate in relevant professional trainings for updating their own skills and competences (e.g. via formal and/or non-formal trainings)
- d) continuously reflect on their own behaviour as a mentor (eg analyse communication processes, personal communication patterns) and make changes as a result



### 3 - Competence Assessment, modalities and evidences

#### Assessment modalities

Assessment modalities required to be submitted in which approximative timeframe by the candidates at the three different assessment stages (initial certification, surveillance, re-certification).

Modalities	Initial certification	Surveillance (yearly)	Re-certification (after 3 years)
<b>Prior the interview (≥ 10 days before)</b>			
a) Prerequisites documented evidence	x		x
b) Submission of business mentoring folders for 3 cases selected by the examiner	x		
c) Self-assessment of competences and collection of supporting documented evidence for the interview	x		x
<b>Interview</b>			
d) 2 hours face to face or Skype (or equivalent) interview session with 2 examiners (at least 2 open questions for each key competence)	x		x
<b>After the interview</b>			
e) Mentee satisfaction survey (≥ 3 per year)	x	x	x

Table C.1 – Assessment modalities and allocated time

#### Candidate's self-assessment

The candidate self-assessment shall address all 15 key competences listed in the Skill Card be supported by documented evidence to be provided during the interview.

The candidate shall transmit the evidences to the examiners ≥ 10 days prior the interview.

#### Prerequisite assessment

Prerequisites are used to verify the candidate's eligibility for the applicable certification level and are eliminatory (or determinant for setting the certification level) in case of noncompliance.



Assessment of the prerequisites shall be performed either by the designated examiner or by a certification body's staff member.

The prerequisites shall be assessed according to the criteria. In any case, the examiner shall have access to the candidate's prerequisites and their assessment.

### Competences assessment

The competences shall be assessed by two assigned examiners registered.

The two examiners shall assess the competences during the interview by cross validation of the candidate's self-assessment with:

- the candidate's answers to the open questions available (at least 2 open question for each key competence, asking each time for a lived example and checking with the evidence produced by the candidate),
- evidence provided and indicated by the candidate to justify the self-assessment
- candidate's folders of the 3 business mentoring cases selected by the examiner.

### Marking of examination results

The examiners give a mark to each of the 15 competences on a scale from 1 to 10 based on the documented evidence provided by the candidate by answering the open questions.

Each examiner shall mark the competence separately, and the final mark is either

- a consensus between the 2 examiners, or
- the average of both examiners' marks (in case they do not reach consensus).



## 4 - Open questions for the assessment interview

During the interview, the examiners shall

- choose at least 2 questions for each key competence, and
- ask for evidence and real-life example for each question, e.g. "what was the context, how did you proceed, what were the difficulties, what were the results (success or not) and what did you do as a consequence?"

### 1. Know and apply strategic orientation/planning and value creation models

- 1) What kind of methods, tools do you use to analyse the market needs related to the Mentee's activity?
- 2) How can you proceed to map the eco-system of a sector?
- 3) Given the sector of (mention an activity sector), in what ways can you identify future assumptions?
- 4) Mention three value creation models that you have used and precise for which type of mission
- 5) How do you help the Mentee set up a long term business plan?

### 2. Establish the relationship

- 1) How do you prepare the 1st meeting with a Mentee?
- 2) How do you make him (her) feel comfortable when you meet?
- 3) Can you explain to me the benefits of the mentoring relationship? (as if I was a Mentee)
- 4) Can you tell me the differences between Coaching and Mentoring?
- 5) Can you explain me what is the Code of Conduct of Business Mentoring?

### 3. Analyse mentee's needs

- 1) What can be the project needs of a Mentee? (issues, concerns, ...)
- 2) What can be the learning needs of a Mentee?
- 3) What kinds of support can you bring to a Mentee?
- 4) What kind of resources do you need to perform a mentoring process?
- 5) What may justify that you refer the Mentee to someone else?

### 4. Determine objectives and select methods and tools to achieve them

- 1) What were the measurable objectives determined in one of your missions?
- 2) What are the management and quality tools your master the most?
- 3) What were the methods you have selected in one of your missions, according to the objectives and expectations of the Mentee?
- 4) How do you plan the mentoring process practically?



5. Set-up a mentoring contract

- 1) What are the operating rules of the mentoring process, to be defined with the Mentee? What are the key points of a mentoring contract?
- 2) What are the respective responsibilities of the Mentor and the Mentee during the process?
- 3) What are the key points of a mentoring contract?
- 4) On what does the time frame of the contract depend?
- 5) On what does the budget of the contract depend?
- 6) On what does the time frame of the contract depend?
- 7) On what does the budget of the contract depend?

6. Analyse, assess and help improving the applied management practices

- 1) What kind of methods and techniques can a manager use for his (her) mission of (choose one or two): anticipating, deciding, organising, animating, communicating, resolving, performing, piloting?
- 2) How do you identify, with the mentee, the managing methods and tools he (she) has to acquire or improve?
- 3) Give an example of a managing technique or tool that you have transmitted to one of your mentees.

7. Support effectively the Mentee and facilitate success

- 1) In what does listening actively consist of? Give lived examples.
- 2) How do you demonstrate empathy towards a Mentee and in which situations?
- 3) What different ways of learning can use a Mentee? How do you recognize them?
- 4) How do you build an action plan with a Mentee? Which are the different components?
- 5) What is effectively acting in project mode?

8. Progress the relationship

- 1) Which actions do you take in order to maintain a trustful relationship during the process?
- 2) What can justify a change of objectives, goals during the process?
- 3) What kind of support to you bring to the Mentee in change?
- 4) How do you encourage the Mentee when he succeeds?
- 5) How do you follow up the Mentee between the meetings with him (her)?



9. Closing the mentoring process

- 1) How do you identify when it's time to close the mentoring relationship?
- 2) How do you inform the Mentee?
- 3) Which can be the difficulties at that stage for the Mentee? How do you solve them?
- 4) Which can be the difficulties at that stage for you (Mentor)? How do you solve them?
- 5) What kind of follow up can you propose to the Mentee after the end of the process?

10. Evaluate the mentoring process

- 1) Which kinds of methods have you used to evaluate the mentoring process?
- 2) How do you present this evaluation to the Mentee?
- 3) What are the main good points brought up?
- 4) What are the main points to be changed, brought up?
- 5) What kinds of optimisations have you brought to your mentoring process after these evaluations?

11 - Evaluate the mentoring outcome

- 1) What were the achieved outcomes in one of the mentoring mission you've made?
- 2) For the same mission, what were the differences between the outcomes and the initial objectives?
- 3) What analysis did you bring up, as a consequence?
- 4) What kind of sustainable improvement plans have you proposed to this Mentee?

12 - Evaluate the mentee's progresses and autonomy

- 1) In one of your mentoring missions, how did you assess the mentee's self-confidence and autonomy?
- 2) How did you follow his (her) evolution in his (her) management practices?
- 3) Which kind of methodologies do you use to assess the mentee's acquired outcomes?
- 4) How do you assess the Mentee's acquired learning outcomes?

13. Evaluate the mentor's performance

- 1) How do you evaluate your mentoring performance during and after a mission?
- 2) What was the assessment of the mentee regarding your performance as a mentor, in your last mission?
- 3) What actions do you take to benchmark and exchange on experience with peer mentors?



- 4) What are the benefits of debriefing the mentoring performance assessments with the Mentee?
14. Adjust the mentoring plan and outcome as necessary
1. What kind of corrective actions did you decide with the mentee, according to the assessment results, in one of your missions?
  2. Which part did the mentee take in that corrective plan?
  3. What advices did you give the mentee in order to increase his/her autonomy?
  4. Which professional trainings have you been led to advise the mentees at the end of your missions?
15. Improve the mentoring practices
- 1) What are your main strengths today, as a Business Mentor?
  - 2) What are your areas of improvement today, as a Business Mentor?
  - 3) How do you manage and assess your personnel resources? (self and time management, personal training needs, ....)
  - 4) What are for you the main ethical issues to be taken in account for a Business Mentor?



## 5 - Business Mentor Competence Self-Assessment Template

Name: .....

Surname: .....

Date of self-assessment: .....

The maturity level for each competence shall be scored according to the following scale:

1. Low
2. Modest
3. Average
4. Good
5. Excellent

The competence related evidence supporting files shall be collected and referenced.  
 The candidate shall send the completed Table maximum 10 days prior the interview and bring the related files to the interview, during which they will be used.

Competence number	Score	Key strengths (related to competence)	Areas of improvement	Others comments	Evidence	Nature of evidence
<b>Guidance</b>						
	Se scale above	Which elements of Knowledge, Know How to Do and to Be, justify of your level of expertise for this competence	Which elements of Knowledge, Know How to Do and to Be, could be improved	Which could be useful to precise your level of e	(i.e. corresponding Mission & File where to find the proof of evidence)	to be found in the files)
<b>Example</b>						



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Establish the relationship"	4	Ability to communicate easily and adapt my style to the interlocutor during a first meeting. Sense of observation and listening, allowing the person to feel confident	the preparation of the first meeting, in particular to obtain more information on the company and its current events, beforehand	It's often difficult to make the mentee understand the difference between Mentoring and Coaching at the star		Audio, video (of real interviews or training session); emails sent to the Mentee, before and after the 1st meeting
Self-assessment						
Competence 1						
Competence 2						
Competence 3						
Competence 4						
Competence 5						
Competence 6						
Competence 7						
Competence 8						
Competence 9						
Competence 10						
Competence 11						



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Competence 12						
Competence 13						
Competence 14						
Competence 15						

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