



To Lisa Keane
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Re Mentoring for CPAs Webinar

Presentation is based on the book *Mentoring Process for CPAs CAs*
by Rex Gatto

1. Overview

What is Mentoring – Coaching

- Implementing mentoring
- Why CPA Firms need a Mentoring Process
- Implementing a Mentoring Process
- Skills needed to be a Mentor
- Outcomes from Mentoring

2. Mentoring

- A philosophy and developmental process that enhances the potential ability with the employees, staff and managers

3. Coaching

- Situational and *focused on a skill set* to achieve success

4. Implementing a Mentoring Process

- Identify a Mentor Director
- Train People to be mentors
- Match mentor mentee
- Meeting process

5. General Questions

- Who should be a mentor?
- How does the mentoring process work?
- What are the Mentoring Logistics?



6. Discussion points for Mentee Meetings

- Firm history
- Organizational chart
- Operating Processes
- Firm Vision and Mission
- HR Policies (performance feedback)

7. Advantages from Mentoring

- Develop future Leaders
- Competitive edge
- Retain and motivate the right people

8. Mentoring Guidelines

- Create a safe environment
- Provide feedback
- Guide don't tell
- Be an advocate

9. Mentoring Results

- Career development
- Coaching
- Leadership
- Professional skills

10. The Mentor Leader

- Create a better place to work
- Adapt to change
- Support followers in taking the right action
- Transform followers into leaders
- Support risk taking/challenges
- Treat Profitability as a measurable outcome



11. Mentoring Outcomes

- Reduced employee turnover
- Reduced stress
- Increased Performance
- Increased Communication
- Increased morale

12. Assessments in conjunction with Mentoring

Skills Assessments: Examples - leadership, communication, self-esteem, teamwork, personality, and time management

- 360° Feedback Report
- Upward Evaluation
- Performance Appraisal

13. Mentoring Action plan

Effective Leadership

Effectively managing output and quality of work

Developing staff

- Successfully working with peers
- Successfully working with clients
- Efficiently producing work on time

14. Mentoring Summary

- Clear vision and direction
- Recognition of successful employee performance
- Fair and honest treatment
- Open and clear communication
- Support/Balance of work, family and self
- Support for quality service and product
- Ethical behavior