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mentees with whom they work. According to the AICPA Women's Initiatives Executive Committee's Mentoring Guidelines, a mentoring relationship can ...

Yasmine El-Ramly • Oct. 24, 2016



## The Many Lessons That Mentoring Can Teach

Early in her career, when Kimberly Ellison-Taylor, CPA, CGMA, was working at NASA's Goddard Space Flight Center, her manager asked her for help in preparing a presentation for colleagues who were two levels above him. When she turned over

her work to him, she was amazed to learn that while he would accompany her to the

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- Enhance staff loyalty and engagement.
- Share knowledge and expertise.
- Build a connected, communicative workplace.
- Help the mentee develop a career plan, overcome challenges and provide advice on career decisions.

How does mentoring play out in real-world situations? This article will examine the benefits that several CPAs have found in mentoring relationships.

### **Give a Voice to a Young Professional**

Ellison-Taylor's experience at NASA showed her not only what a good leader should do to help develop his or her people, but also the advantages to that approach. In choosing her to do the presentation, her supervisor told her he didn't want to second guess the preparation she had done and believed she probably knew more about the topic than he did, based on her research. "He told me that if I made a mistake, we would live with it, but he thought it would be more of a mistake not to believe in me," recalls Ellison-Taylor, who is now global accounting strategy director for the financial and professional services industries at Oracle America, as well as the incoming chair of the AICPA Board of Directors. His confidence in her "gave me a voice to speak up and be bold."

Stepping back and getting a wider perspective on his decisions, she came away with the sense that his approach to employee engagement reflected well on him. "If your people do well, it's a testament to your strategy and the environment you create," she says. "It's an amazing accomplishment if you can nurture people who go on to be leaders in their own right."

### **Step Outside a Comfort Zone**

A key objective of any professional organization, notes CPA Katy Hollister, managing

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use their organizational influence to advocate for you, help you to gain visibility for key projects, assignments or promotions and articulates why you're qualified for the next challenge.”

No matter what approach an organization takes, “if you don’t have a system to bring along the next generation,” she says, “you can’t get back to your original purpose, which was to have a sustainable organization.” Mentors (along with coaches and sponsors) are often the facilitators who bring along that next generation.

That sometimes includes forcing the mentee—and perhaps even the organization—to step outside their comfort zone. In Hollister’s case, she was a liberal arts major with a creative, risk-taking streak, but at Deloitte she learned how to build a concrete plan to execute her thoughts. “If someone hadn’t appreciated my strengths and taken the time to push me where I needed to develop,” she says, “I would have missed out on the power of complementing my right brain creative strengths with left brain organization, project management and execution.”

A mentor can help a mentee understand their personal brand, and then help the mentee to see their unique value to an organization. A mentor can also help a mentee develop in new ways to earn a desired brand. “If you want to stand out, you must differentiate yourself. You need to be aware of and present that special thing you bring to the table, so that people will say, ‘We need that person here,’” she says.

Mentoring enables organizations to benefit from bringing together professionals at different levels and with different outlooks and experiences. As a mentor herself, Hollister has found it exciting to learn about new perspectives from mentees. “When you work with people who have different backgrounds and perspectives, it opens you and the organization to new ideas. You can’t really get started solving hard problems until you see them from all sides.”

**Learn to Take Chances**

Because they recognize its value, some organizations begin their mentoring as soon

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...continue how to get the resources they need to have a happy, and thriving career at P&N.”

From her own mentors, Burkart learned how to speak up. “I noticed that men are not shy about asking for what they need or want,” she says. “Even though I might be a quieter person and have a different style, I learned from them how to use my own voice effectively.” She also grew more comfortable in her ability to tackle challenges that may be somewhat outside her expertise. “I realized that being a good professional and a leader doesn’t mean you have to have an answer immediately,” she says. “You can let the client or colleague know you’ll get back to them in a day or two.”

She was also encouraged not to be intimidated by opportunities that seemed beyond her capabilities. “Take the chances that are presented to you even if you’re unsure whether you will succeed,” she advises. “Take some risks. There are so many fun things you can do, but you don’t know what you’re missing if you don’t try. And you can always ask for help or advice along the way.”

It can be tempting to stick to assignments in which you’re comfortable you can do it all, but Burkart believes that letting go of that idea has led her to be a better team leader and mentor. “I now encourage others to participate,” she says. “I know I don’t have to run every meeting or present every report.”

Being a mentor can offer worthwhile perspectives on your own interaction with others, she says. “It can be valuable to get feedback from those above and below you on how you communicate.” Burkart also appreciates having the chance to watch people grow. “It only takes a few minutes to say ‘You can actually do this.’ And then it’s a joy to see people find a way to reach their goals in the accounting profession.”

**Achieve Success on Your Own Terms**

Stewardship is a core tenet of Baker Tilly, according to CPA.CITP Christine Anderson,

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about going out after work or golfing on weekends,” she says, times when any parent with young children may want to be at home. To achieve an efficient use of her time while still preserving her personal time, she focused on client or networking breakfasts, lunches and occasional dinners. She made the most of her networking efforts by using her listening skills to better identify what clients or prospects were seeking and understand what people are really looking for. “My approach in talking to clients or prospects was, ‘Let’s work together to find a solution.’”

Anderson believes mentoring is critical, but notes that it can take different forms, both formal and informal, and that different mentors, both male and female, can provide a variety of insights. Some of her own mentors have helped her understand how to balance work and family, some offered advice on the inside baseball of a firm and others have helped her look for new professional opportunities.

It is possible for the process to hit snags along the way. Mentoring may not work as effectively, she cautions, if mentor and mentee attempt to accomplish too much too soon. For a mentee, “opening up about your uncertainties and getting feedback on what you’re doing right or wrong can make you feel very vulnerable,” she says. As a result, she advises against, for example, trying to discuss your greatest fears or weaknesses on day 1. “Build trust, lay out the challenges you see and foster the relationship,” and the benefits will begin to accrue over time. Also be ready to start over with someone new if necessary. “I have had bad mentorships,” she says. “Sometimes the mentor didn’t really listen or we just weren’t aligned in our thinking.”

## **Achieve a Balance**

“The profession has enabled me to balance all I want to do,” Anderson concludes. Because her mentors helped her to speak up about her needs and delegate some responsibilities, she was able to attend the important events in her family’s life. “You

don't get that in other professions," she says. That's why she is particularly

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