HARBOUR INVESTMENTS, INC.

# Peer Mentoring

# Program Information

Discover the power of Harbour's Peer Mentoring Program where connections ignite growth and inspiration thrives. Imagine a dynamic community where peers become allies on your journey to success. This isn't just about sharing knowledge—it's about forging meaningful relationships that propel everyone forward. Whether you're navigating the entrepreneurial landscape, seeking fresh perspectives, or striving for personal growth, our group offers a supportive environment where ideas flourish and ambitions are realized. Together, we explore strategies to enhance business operations, foster innovation, and unlock new opportunities. Join us in shaping a future where collaboration fuels prosperity and every voice adds to collective wisdom.

## Program Details

- 4-6 members per group
- 13-month commitment
- One two-hour meeting per month
- DiSC profile https://www.truity.com/test/disc-personality-test
- Quarterly Goal Setting and KPI tracking
- First 3 meetings assisted by previous participant
- Use pre-built topic templates to guide conversations
- Harbour will create groups based on applicants

Peer mentoring is a process where people of similar ages, experience levels, or both, work together to help each other grow. The relationship is less formal than a traditional mentoring relationship, yet structured so that it is mutually beneficial. A peer mentor is a friend, coach, and companion. It is a "meeting of the minds" – a place where you can speak the truth and expect it in return. They provide support and advice and function as a resource for inspiration and new opportunities. In this group you will both give and receive advice.

# Benefits of Peer Mentoring Group

The benefits of peer mentor groups are vast. In the best groups, members hold each other accountable for their goals – driving each other to reach the highest levels of success.

## BUILD YOUR NETWORK

A quality group provides you with a peer community who will elevate your life. You will be around other driven businesspeople who will energize you to go after your goals. The group shares business contacts and provides recommendations and references.

## SHARE YOUR IDEAS

Whether you are just starting in business, want to grow your existing one or are starting to think about your exit strategy, a peer mentor group is a place to share your ideas and get feedback. A quality group will brainstorm with you, provide a different perspective and poke holes in your strategies.

## ELEVATE YOUR SKILLS

An ideal group brings together businesspeople with different levels of skills and different strengths and weaknesses. This way, each member can lend their strengths to other members of the group and work on their weaknesses. This group will help you question your limiting beliefs, face your fears and challenge you to do better, every day.

## GET SUPPORT

The most important answer to the question, “What is a peer mentor group?” is that it is a resource you can tap into for support, advice and celebration. It is a supportive community who celebrate your successes and understand your failures. They always encourage you to get back up again, and when you do achieve a goal, they will be there to celebrate your success.

# Program Timeline

- Application Deadline: Friday, October 25th
- Harbour will create groups by Monday, November 4th
- First Kick-Off Meeting: late November/early December
    - Overview of Group
    - Icebreaker
    - Participation Agreement - See Appendix G
    - Discuss meeting norms - See Appendix H
    - Discuss calendar and topics for the year
    - Outlining roles and responsibilities of members - See Appendix B
    - Next steps to prepare for the group
- Monthly Meetings begin in January
- Group concludes in December
    - Wrap-up and Recognition
    - Determine Evaluation
- Process repeats annually
- Groups may continue to meet beyond one year

Appendix B

# Peer Mentoring Group Roles and Responsibilities

Most peer mentors are very busy, so the group might consider rotating roles from meeting to meeting. For instance, the person who facilitates today's meeting might take minutes at the next meeting, and so on. Your group should come to a consensus on the roles the members are going to take. The Project/Group Manager will also assist the group with defining the mission, focus/goals and timeline.

- **Project/Group Manager** – In order to run effective meetings, it is important to set ground rules and have each member aware of their role and responsibilities.

- **Meeting Planner** – Sets up Zoom for the next meeting and informs the group of date, time and location. Invites guest mentors or speakers, if applicable, according to what the group has determined at previous meeting(s). Coordinates with the Meeting Facilitator regarding the agenda.

- **Meeting Facilitator** – Runs the meeting, ensures everyone has a copy of the agenda ahead of time, sends reminders to the group, keeps everyone on task and following the agenda during the meeting, facilitates the discussion of what the next meeting will entail. If evaluations are taken at each meeting, the facilitator would also distribute the evaluations and compile data for the next meeting.

- **Minute Taker** – Takes notes at meetings and disseminates to the group so everyone is aware of what needs to be done prior to the next meeting.

- **Other** -

## APPENDIX C

# Peer Mentor Role Guidelines

**Responsibilities of the Senior Mentors**

- Provide framework for meetings
- Set clear expectations from the beginning
- Review participant pre-test self-assessment
- Facilitate skill acquisition
- Be readily available for peer questions/needs
- Coordinate protected time
- Commit to at least one meeting per year/quarter

**Responsibilities of the Peer Mentors**

- Set clear expectations from the beginning
- Accept responsibility for coordinating meetings with mentor
- Prepare for every meeting; have an agenda or list of issues for discussion
- Respect the mentor's time; do not give him/her anything to read with less than 48 hours' notice
- Maintain a positive attitude
- Doggedly pursue goals (tenacity)
- Learn to ask for what you need
- Focus on the task at hand
- Maintain personal and group accountability
- Acknowledge contribution of facilitator-mentors and do not use intellectual property without their consent
- Agree to take on an intellectual challenge
- Use humor whenever possible to defuse stressful situations
- Construct a mutually beneficial role/relationship with peers and facilitators
- Be willing to give and receive constructive criticism
- Work collaboratively toward stated goals
- Keep what is discussed at meetings confidential
- Be respectful of others' opinions
- Be respectful of others' time
- Follow through on promised tasks
- Have the courage to try new ways of thinking

**APPENDIX D**

# Meeting Agenda

- Opening Check-in
- Quarterly Meetings Only: Goals & KPI Status Updates
- Topic Discussion (use pre-built template to guide conversation or new topic)
- Next Steps
- If time: anything else
- Meeting Assessment: scale from 1-10 and most valuable part of meeting

## Sharing Resources with Pre-Built Templates

**Topic Templates** – Facilitate group discussions on key topics, share resources and best practices with each other. You may choose to have a participant presentation where the expert participant presents as well as facilitates a group discussion around their topic of expertise.

1. Introductory Meeting
2. Business Owner Documents & Planning
3. Business Succession
4. Business Vision
5. Client Experience
6. Client Review Meetings
7. Employees & Compensation
7. Fit Meeting & Discovery Process
8. Marketing & Prospecting
9. Onboarding New Clients
10. Technology Stack
11. Trading & Investment Management

**Learning Exercises** – Can choose a program and identify a member to facilitate the exercise. See below for some ideas:

- **The Elevator Speech** – Ask participants to develop and deliver a "10-second" elevator speech that describes what they do for a living. This exercise trains participants in a high impact technique to introduce themselves at conferences, workshops, and networking events; and helps them learn to describe their job in a positive, results-oriented way.
- **Self-Reflective Exercise** – Ask participants to complete a matrix of their preferences and skills to reflect on their current experience and developmental needs. Have participants categorize their skills and preferences into four categories: (1) things that I like and do well; (2) things that I don't like and do well; (3) things that I don't like and don't do well; and (4) things that I like and don't do well. Things that participants like and don't do well can serve as the basis of actions and future developmental planning.

- **Active Listening Exercise** – Engage participants in a structured exercise to practice and demonstrate their listening skills.
    - ➔ **Speak/Listen**. Break participants up into pairs, with one person acting as the listener and one the speaker. Ask the speakers to speak on a topic provided by the workshop facilitator until time is called and the listener to only listen (not respond/talk at all). Provide a topic and give each pair 4-5 minutes to engage in the exercise, then stop, and re-group as a larger group to debrief the experience.
    - ➔ **Debrief**. Ask speakers to report on *What was it like to be listened to? How was it different from what you're used to? Was there anything difficult about it?* Ask listeners to report on *What was it like to listen? How was it different from what you're used to doing? Was there anything difficult about it?*
    - ➔ **Demonstrate**. Go around to pairs and ask speakers for their permission for the listeners to repeat out loud a statement that captures the main point of what the speakers were saying. Then, validate with the speakers if the listeners captured the essence of what they were saying and ask them to offer feedback about if the statements captured both facts and emotion. Repeat for each pair.

HARBOUR INVESTMENTS, INC.

## APPENDIX G

# Participation Agreement

**Members:**

| Name | Email | Cell number | Work Number |
|---|---|---|---|
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |

**Group Expectations**: (Agreed upon by all)
Purpose of Group: _____
Meeting Frequency/Length: _____
Meeting Place: _____
Planned Duration of Group (e.g. one year): _____
Who will play what role: _____
_____
_____

**We, the undersigned, have discussed and agreed to a mentoring partnership with the understanding that we will maintain confidentiality.** (Sign below)

## APPENDIX H

# Meeting Standards/Norms

### Meeting Norms

1. Prepare in advance of meetings
2. Come to meetings on time
3. Be an active, engaged participant
4. Listen and encourage others to speak
5. ***Ensure Respectful Communication***
6. Keep an open mind to alternate views
7. Keep your emotions in check
8. Keep sensitive information confidential

### Four Features of Excellent Meetings

1. Sense of accomplishment
2. Decisions of:
   a. High quality
   b. Importance
3. Little redundancy
4. Fun!

### The Seven Sins of Deadly Meetings

1. People arrive late, leave early, and spend most of their time doodling.
2. Meetings are too long.
3. People wander off the topic.
4. One or two people dominate the conversation.
5. Excessive interruptions.
6. Nothing happens once the meeting ends.
7. People don't tell the truth.
8. Missing important information, so they postpone critical decisions.
9. Meetings never get better.

**APPENDIX H**

# Skills for Effective Meeting Leaders

**Before the Meeting:**

1. Set meeting purpose and outcomes
2. Communicate meeting plan
3. Distribute necessary information in advance (e.g. agenda)

**During the Meeting:**

1. Come prepared with necessary information
2. Ensure Respectful Communication
3. Manage the process
4. Manage conversations
5. Manage problem behaviors
6. Allow participants to be engaged
    a. Facilitate discussions, round robin, small groups, parking lot, be available to talk individually
7. Ensure good decisions
8. Provide next steps

**After the Meeting:**

1. Distribute any notes taken during the meeting
2. Follow up
3. Honor your commitments
4. Constant Communication

***Meeting Assessment:***

- ✓ Provide feedback
- ✓ Enhance team and meeting effectiveness

Ask…

- ✓ "Rate the meeting on the Scale of 1-10 with 10 being the best and share what was the most valuable part of the meeting"
- ✓ "What did we do well?" and "What could we have done differently?"
- ✓ "What was helpful or effective?" and "What was not helpful or effective?"
- ✓ "Provide one word to describe how you feel about today's meeting"

## Appendix I

# Mentoring Do's & Don'ts

| Do | Don't |
|---|---|
| ✓ Clarify and establish what goals you will be working on during the Mentoring Program | ☒ Set unrealistic goals that are difficult to achieve and measure |
| ✓ Decide where meetings will be held and allow for sufficient time | ☒ Hold meetings where distractions are likely |
| ✓ Listen actively and mirror your understanding by repeating what your peer mentor has said | ☒ Interrupt except to clarify points or statements your peer mentor has made |
| ✓ Keep the tone positive and emphasize your intention to be supportive | ☒ Evaluate, pre-judge or cast blame |
| ✓ Ask questions to gain more information and ensure understanding | ☒ Be afraid to ask clarifying questions if the conversation is confusing or losing direction |
| ✓ Create action items to be achieved by each meeting that support desired outcomes | ☒ Create unrealistic action items that you know you won't complete |
| ✓ Review action items and evaluate what worked and what didn't | ☒ Forget to follow-up on the action item(s) your peer mentor committed to |
| ✓ Be willing to give and receive positive and negative feedback | ☒ Be vague and inconsistent with giving feedback |
| ✓ Build on past achievements and give encouragement and praise | ☒ Avoid asking what can be learned from past mistakes to problem solve obstacles |
| ✓ Challenge what is being said and ask how it is relevant to established goals | ☒ Miss opportunities to pinpoint achievable goals |
| ✓ Enjoy watching your peer mentor achieve great things! | |