

SCORE Mentoring Handbook



SCORE Mentoring Handbook

A Guide for Working with Clients

The SCORE Mentoring Handbook is a comprehensive resource of mentoring guidance. This handbook includes the SLATE methodology as well as all the processes and procedures to carry out an effective mentoring session and best serve our clients. It is a one-stop source for all SCORE mentors, both new and existing.

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I. Introduction to SCORE Mentoring

A. Summary

This is a one-stop source for SCORE mentoring guidance. The purpose of this document is to give new and existing SCORE mentors guidance for serving our clients. It describes how to provide clients the information they need to make sound decisions for their business. We will always do this in a professional and ethical manner throughout the relationship. You are making a difference as part of something that is greater than any one of us alone. Thank you.

This document focuses on The SCORE Mentoring Methodology based on SLATE and behavioral best practices for mentors. We use a client relationship management system called Engage for client interactions. We use the Google Suite including the use of a SCORE volunteer email address for all SCORE communications. There are courses and tools to help you learn Engage and Gmail. You will see some references to them throughout this document.

- **Various Benefits of Mentorship**

As a SCORE mentor, you join the thousands of other SCORE mentors who are committed to help small business entrepreneurs for no personal monetary gain. Ask any volunteer why he or she does what he or she does, and you'll hear stories about giving back and comments about how good it feels.

At SCORE, we like to talk about the five benefits of mentorship that our mentors often mention.

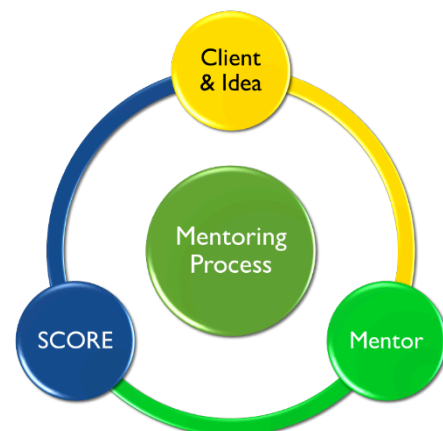
1. Chance to have a positive impact on the small business ecosystem throughout the United States
2. Opportunity to give back
3. Chance to learn, keep skills sharp and grow personally
4. Opportunity to be part of another's success
5. Chance to join a group with a proven track record of success

Self-Assessment/Reflection: Which of these benefits of mentorship resonate with you? Are there additional benefits that you can think of?

B. Expectations

The SCORE Mentoring Process guides us as we work within three sets of expectations as shown in Figure 1. Some expectations are fundamental; others can only be discerned with the use of SLATE. They all matter.

- The Client & Their Idea or Question
- SCORE Association



- Our Own Expectations as Mentors

- **Fundamental Expectations:**

- We all want to be understood and appreciated for who we are.
- We all want to be treated with respect.
- Mentors work in service of our clients.
- SCORE volunteers support our Mission and Vision.

- **Client Expectations**

Their expectation/hope is that they will be listened to and assisted in a positive manner. Clients take a risk when they ask for help. They are exposing themselves and their ideas to possible criticism. Nobody wants their idea invalidated. Negative comments regarding their ideas are the same as judging clients personally. SLATE is a positive approach.

They expect a fulfilling conversation with an experienced person who is willing and able to assist them in getting what they need. While online search and Artificial Intelligence tools can supply answers to questions, **discussion with a mentor is a dynamic and an irreplaceable human relationship.**

They expect answers and guidance. They may not yet know the right questions to ask. The first session often is a discovery session. We have the opportunity to guide them with the SLATE process. We can help them to learn and grow.

They may expect a Yes or No decision on a business idea. We will guide and empower them to make their own decisions. Some mentors tell their clients that their job is to guide them to having all the information they need to make the best business decision, and it is up to them to make that decision.

They may be looking for funding. We can help them to do the planning and analysis needed to determine the value of the business idea. This helps them to know if, where, and how to raise capital.

They may expect a purely transactional one-time interaction. We have the opportunity to create a relationship for them with us and SCORE resources for the life of their business.

They may not yet have professional behaviors and courtesies built into their conduct. We can communicate and demonstrate business standards such as honoring appointments and being responsive in communications.

It is fundamental that we expect all people to be treated with respect. We will not tolerate abuse or harassment from clients. Report problems to your leadership.

Expectations of clients are communicated on the [FAQ page on our website](#). Having a conversation with your clients and level-setting expectations is an important part of mentoring. The use of SLATE and best practices are designed to help both mentors and clients have a good working relationship.

■ SCORE Expectations

As a SCORE volunteer you have been through an interview and on-boarding process. Through this you've seen our focus on high quality support for our clients. To ensure consistent and on-going quality Mentoring we ask that you annually reaffirm acceptance of the SCORE Code of Ethics.

SCORE expects you, as an independent contributor, to comply with these guidelines.

- Be the face of SCORE to the client by listening, asking clarifying questions, and determining the next steps in the Client's journey with SCORE as you first meet a client and throughout your time together.
- Respond to Mentoring Requests (MREs) within 2 business days from the time of assignment. **Accept every assignment to assess client needs.** Add or refer clients to other mentors as appropriate.
- Understand the needs of the client as our first priority. As mentors, we are here to listen, assess, and then guide.
- Refer clients to other mentors when appropriate. [Use the search function in Engage to find the best fit](#) from across the nation or contact your Client Intake Coordinator (CIC) ASAP for reassignment.
- Enter client session notes within 24 hours following the actual session for accurate record-keeping.
- Use your scorevolunteer.org email account for all email communications with clients, volunteers and staff to preserve confidentiality.
- Close out mentoring requests if you do not hear from a client after 2 weeks and 3 attempts to contact.
- Review and update your profile and capacity annually, maintaining keyword-rich information
- Read and act on SCORE emails daily.
- Utilize the pause feature when you are unable to mentor due to vacations or capacity control.
- Be a regular attendee at chapter meetings, continuing education programs and webinars/workshops.
- As mentors we put aside our own expectations and opinions to assist the client.

■ Mentor Expectations

Your expectation that this will be a fulfilling experience for you is a good one. You have the opportunity to take the initiative to engage with our clients, each other, and the organization to achieve that goal. Supporting new and fledging small businesses can be rewarding.

As a mentor, you are looking to make a positive difference with your client and to leave clients with a favorable impression of SCORE and the work the organization does. We call this “engaging” the client.

At SCORE, you should expect to mentor many types of clients from various industries and backgrounds. Our client mix is very diverse but one demographic worth noting is that nearly 57% of our clients are in the ideation phase.

We receive so many mentoring requests and all Mentors are expected to be ready to accept all assigned requests. You can tap into SCORE online resources and other mentors to assist you once you have assessed what a client needs. Maintaining a strong profile will help attract clients who need your particular speciality.

On a human level, client engagement is the degree to which you, the SCORE mentor, have established a meaningful bond, both rational and emotional, with your clients.

SCORE has observed several characteristics of successful mentors. Review the following list and consider those characteristics/behaviors that you think you will be strong in.

- Creating, maintaining, and fostering effective client relationships
- Helping the small-business owner succeed
- Using a proven methodology to manage the client relationship effectively
- Relying on a proven track record of success to affect a client interaction in a positive way
- Wanting, altruistically, to help small-business owners
- Devoting time to learn, understand, and help clients
- Displaying a professional demeanor that adapts to the client's needs
- Using effective communication and listening skills
- Applying knowledge about current business practices

This list of characteristics/behaviors is not meant to be an exhaustive list, but merely a guide to help paint a picture of what other successful SCORE mentors identify as being crucial to success in their role. Some of these behaviors/characteristics might be things that you are good at, while in other areas you may not be as strong, but may want to grow.

Self-Assessment/Reflection: Look at the items you didn't identify as a strength. How can you learn more about any of these areas? Plan to discuss your strengths and areas where you may want more support or learning with your chapter leadership.

- *Membership Requirements*

As per SCORE's Policies and Procedures, there are five requirements that must be met as a threshold for continued service with SCORE.

- Compliance with all training requirements, including the completion of the online annual Code of Ethics training.
- Use of the scorevolunteer.org email address provided.
- Active engagement with SCORE so that 6 months of inactivity does not occur. Inactivity is defined as not having participated in any capacity or role that contributes to the success of clients or the chapter
- Use of the SCORE recording system to maintain and record all activity.
- Acknowledgement that any material developed to be used as material or content for SCORE client services or operations (workshop content, training materials, marketing materials, software applications, etc.) belongs exclusively to the SCORE Association unless otherwise agreed to by the SCORE Association and other parties."

Be mindful of [SCORE Expectations guidelines](#).

C. What Differentiates SCORE?

- What Makes SCORE Unique?

SCORE is totally unique from other SBA resource partners and small business-facing nonprofit organizations **because of our nationwide network of volunteers**. We are the only organization of our kind that is 1) all volunteers and 2) part of a connected nationwide network, ensuring anyone has access to our services, no matter where they live.

Our 10,000 volunteers are a diverse group of experienced business professionals from all across the nation and all areas of industry. Their firsthand experience in executive leadership and/or entrepreneurship helps clients to avoid common pitfalls and execute best practices faster and more effectively than they could without mentoring. Each year, SCORE volunteers donate more than 4 million hours to the SCORE program, making our program tremendously efficient and cost-effective.

The OneSCORE network allows business owners to tap into the entire nationwide ecosystem of SCORE's business training and knowledge – not limited to the local geographic area. Clients take online workshops and consult with mentors who have relevant knowledge anywhere in the U.S. Chapters frequently consult with each other, working together to provide best-in-class assistance to the business owners they serve.

■ Who We Are

Through a nationwide network of thousands of volunteers serving the country's 50 states and its territories, SCORE helps small business owners start, grow, and achieve their goals. In turn, this creates tens of thousands of new businesses and jobs annually, improving the economic health of our local communities and the country.

Our volunteers are the lifeblood of our organization, and our efforts are driven first by the needs and wants of our clients and then by the unified values, mission, and vision of SCORE.

In strict compliance with the SCORE Code of Ethics, our mentoring services are always free, confidential and neutral, separating us from most other business assistance organizations. *Our entire focus is on helping the client to make the best possible business decisions they can.* We are not distracted by trying to build our own wealth or to keep our jobs in the organization. It is a privilege to serve U.S. small businesses.

It is a privilege to serve our country in such meaningful ways through SCORE.

The SCORE Code of Ethics differentiates us from most other mentoring and small business support organizations. We are neutral and keep the client's interests ahead of all else. [Read the Code of Ethics and find supporting information on the help center at this link.](#)

Main headings include:

- Respect
- Clients Matter
- Conflict of Interest
- Compensation
- Volunteer Commitment
- [FAQ's and Examples can be found at this link](#)

The SCORE Code of Ethics is part of our onboarding training. We are required by our federal grant to recertify compliance every fiscal year; the COE module is included in our catalog of training courses. You can access it and other volunteer development courses through the **Volunteer Training** link near the top right corner of the landing page on Engage when you sign in.

These traits describe who we are and how we should behave toward our audiences.

SCORE research shows that client and prospect groups consistently matched the following attributes with SCORE:

- **Trustworthy** - -At SCORE, our work with our clients is confidential. They trust us to keep their information, struggles, and relationship with us a secret, and that trust is paramount to a successful mentoring relationship.

They also trust that we will provide the best business guidance based on objective, reliable information from credible sources and not use the SCORE relationship for personal profit or benefit.

Here are a few statements made by SCORE clients about their relationship with us that reflect our role as trustworthy advisors:

- **"Has my best interests at heart"**
- **"A good listener"**
- **"Being there, being reliable and responsive"**

- **Expert** - - SCORE is America's trusted source for business mentoring and education. The expertise of our volunteers and staff is the backbone of who we are and the service we provide to clients. Being an expert means that as a SCORE volunteer or staff member, we have a depth and breadth of knowledge on a topic. It means the information we share is sound and rooted in data and proven facts. It also means that if we don't have the answers, we can be trusted to find credible sources within the small business community to provide an answer.

Here are a few statements made by SCORE clients that reflect our role as experts:

- **"Experience across all industries and business topics."**
- **"Time tested and proven knowledge related to my business."**
- **"Thought leader for small business and entrepreneurship."**

- **Intelligent** - - In addition to being experts, our clients and partners expect us to be intelligent. Intelligence in this context doesn't necessarily mean that we are expected to know everything. Instead, we are expected to have the capacity to understand complex ideas and to be able to provide solutions based on the information we're provided.

It also means that we're expected to possess emotional intelligence and be able to appreciate and empathize with people of different backgrounds, knowledge and

NPS Survey Rating of Ten, Client

Comment: Having the option to connect in real time with someone who understands the challenges I am facing and can provide an ear to listen and resources to help me overcome the challenges is so amazing, I am grateful to have access to SCORE.

experience. When acting or writing on behalf of SCORE, we should be able to separate ourselves from negative and personal feelings and remain professional and supportive at all times.

Here are a few statements made by SCORE clients that reflect what they expect in regard to our intelligence:

- **“Emotional intelligence.”**
- **“Practical, useful advice that I can use.”**
- **“Problem solver.”**
- **Straightforward** - - At SCORE, we serve as the public's authority on small business formation and growth. People turn to us for information and advice.

Being straightforward means providing facts, guidance and solutions without beating around the bush or being deceptively optimistic. Sometimes we may be required to provide hard truths to support our clients and stakeholders best. We must be honest and direct without being hurtful or offensive.



Here are a few statements made by SCORE clients about our straightforward nature:

- **“Tells me like it is.”**
- **“Doesn't shy away from tough truths or difficult challenges.”**
- **“Honest. Candid.”**
- **Helpful** - - Being helpful means being ready and able to provide support that will be meaningful and impactful to our constituents. Within the context of the services and resources that we provide, it means being able to provide valuable, actionable information to our audience. It also means being so deeply rooted in small business and/or the local community, that we can point them to other organizations if we don't have the answers or can't provide the necessary support. It means making a difference and providing the tools to make a positive impact on the people we serve.

Here are a few statements made by SCORE clients that show how we can be helpful:

- **“Focused on me and my problem and gets me to a solution.”**

- "Relates to me and my situation and can communicate at my level."
- "Not holding my hand but pointing me to the right resources."

Here are a few communication examples for volunteers:

- "Have you considered..."
 - "I would suggest..."
 - "You may find this process/resource/tool helpful."
- **Leader** - - In the small business community, we are called to be at the forefront of what's happening in our space. This means staying abreast of the latest small business trends, strategies and technology; as well as what's happening in the macro environment that might affect our clients.
 - It means being decisive and viewed as an authority in your expertise. It also means operating with integrity in all that we do. This builds trust and respect with all audiences, strengthening our position as trusted guides and experts.

Here are a few statements made by SCORE clients that reflect how we have been a leader for them:

- "Takes charge and looks for new resources and up-to-date information."
 - "Gives direction and guides me to the shortest path."
 - "Operates with integrity and wisdom."
- **Warm** - - Though we are intelligent, straightforward experts, we are a people-focused organization that genuinely cares about the success of our clients. As such, we should present warmth in our interactions and communications with business owners, partners, staff or other stakeholders.

Being warm means being friendly, open, enthusiastic, positive, empathetic and understanding. Our tone should be upbeat and optimistic. Starting, running, growing, closing or selling your business can be difficult, but it's less so when you have SCORE as your partner. We are cheerleaders, we are accountability partners, and we are sounding boards and advisors.

Here are a few statements made by clients that describe SCORE's warmth:

- "Friendly and approachable."
- "Encouraging and supportive."

- "Understanding and empathetic."

Bringing These Traits to Life

These traits describe who we are and how we should behave toward our audiences. You should exemplify these characteristics in every communication and interaction with SCORE clients, partners, staff and volunteers.

The SCORE identity was developed to represent and support our organization's brand values:

- We are people-focused. Business owners trust us and our mentors to help them accomplish their business goals and dreams.
- We are business-oriented while remaining public-spirited.
- Our working style is helpful, optimistic, and accessible.
- We are a contemporary organization, keeping pace with the times.

Remember our Mission, Vision, Values, and SLATE continue to guide us.

II. Differentiating SCORE Mentoring From Consulting

We are Mentors Not Consultants

To better understand the SCORE mentor role, let's compare mentoring and consulting. Although it might seem slight, the difference between mentoring and consulting is significant. As a SCORE volunteer, your mission is to mentor entrepreneurs, not consult.

Consultants are typically responsible for completing some or all of the required work for their clients.

Mentors, on the other hand, help their clients think through situations, help them discover answers to their most pressing questions, and help their clients to do the work themselves. Consider the proverb "Give a man a fish and you feed him for a day, teach a man to fish and you feed him for a lifetime."

A Consultant may tell a client "No!" A SCORE mentor using SLATE will empower clients to make the best business decisions they can make. If not this idea, the next... Encouraging the entrepreneurial dream.

It is crucial that you consider this difference while working with your clients. They are coming to you for advice, counsel, and help. They shouldn't come to you to get their work done *for them*, and in no way should they seek your efforts for a price.

In addition to understanding your role as a mentor, it is important to understand your role with the client.

As you begin meeting with clients, keep four important questions in mind:

1. Who am I to this client?
2. What is this client expecting of me?
3. How can I provide the best service to this client?
4. What are this client's unique needs?

You know something valuable about business and are willing to share that with others. You may have even consulted or been a mentor in business. Your opportunity now is to learn SLATE and SCORE best practices that have been developed over decades and hundreds of thousands of client engagements.

Self-Assessment/Reflection: Consider why it is more important to help a client learn how to make their own decisions rather than for you to make decisions or do the work for them.

III. Definitions and Standards

A. Client: Who can be a client?

Client Definition

'Client' shall mean any person who has received any service from SCORE, including mentoring and training services, whether in person or virtually delivered locally or nationally. As stated in our Federal Grant Terms & Conditions, SCORE may not utilize resources to provide support to clients who have a business, or intend to start a business, outside of the United States and its territories.

SCORE uses a client's email address as their primary unique identifier. Every attempt should be made to obtain and maintain every client's valid email address. Services rendered to any client without an email address cannot be counted.

NOTE: SCORE and SCORE's volunteers ARE NOT directed, nor expected, nor have any legal basis or authority to ask for a client's immigration status, nor should a SCORE volunteer deny service to any client based upon suspected immigration status. Denial of service is only adjudicated when a client freely informs SCORE of their illegal immigration status or if SCORE is duly informed by the SBA that the individual is not lawfully within the United States.

Additionally, as per the terms and conditions of our SBA grant, there are restrictions on certain types of clients that SCORE volunteers may support. For example, SCORE volunteers may not provide service to businesses based in a foreign country. SCORE also has restrictions for non-profit clients, as well as gambling and drug-related businesses. To learn more about these

restrictions, visit this policy page on the Support Center. [Client Service Standards and Definitions](#)

B. Mentoring Definition (e.g. what is a mentoring session?)

Mentoring Definition

Mentoring is defined as one client benefiting from personalized SCORE interaction. This interaction can be with one volunteer or multiple volunteers. The interaction must have provided substantive advice (of sufficient value to have resulted in a billable client service by a paid consultant). These interactions can occur in person, via video, phone, email or chat. The client or primary mentor must complete the client information requested in SCORE reporting systems and the lead mentor must add session notes detailing the interaction.

Other items of note on mentoring:

- There is no minimum time requirement for the first session recorded in Engage or for subsequent visits (follow-ons). All sessions, including the first session, must be entered into Engage within 24 hours.
- The Business Entity is the client.
 1. A session with two or more individuals representing a single business entity or client counts as one mentoring session or case.
 2. In a co-mentoring session, where two or more mentors collaborate to provide advice to a single business entity or client, the interaction is recorded as one session.
 3. Preparation and travel times are reported to the SBA but are tracked separately from the actual "mentoring session hours". In Engage, there are two aptly named fields, 'Prep Time' and 'Travel Time,' where Mentors can enter and track this information.
 4. If a client sends the Mentor a document to review, and the Mentor spends 15 minutes or more reviewing and commenting on the document, then sends the client their review comments in an email, this constitutes an email session. The time spent reviewing the document and creating the email response can be entered as the time of the session.
 5. An email could count as a mentoring session if it contains detailed answers AND resource recommendations (e.g., a link or two to the tools, templates, etc.)". Mentors should copy and paste the email into the Session Notes. Additionally, Mentors should email within the Engage so that future Mentors to this Clients have all the pertinent information.

What Does Not Constitute Mentoring

Providing non-business information or advice is not counted as a case or session. The following are examples of some of the activities that do not constitute a mentoring case or a session. These examples CAN still be recorded as a Client Note within the client record in Engage.

- Client calls for and receives directions to the chapter or information about office hours or SCORE activities.
- Client calls for and receives the telephone numbers of local or state government offices for business registration or other contact information for other potential resources.
- Client visits or is referred to a chapter, mentor, workshop, or website for information. This includes an email response to a mentoring request advising them to seek a workshop training service.
- Client downloads information, software, templates, or other files from a chapter volunteer or other website without mentor contact that meets the definition of a case.
- Client is sent an email newsletter or marketing information electronically.
- Mentor contacts a client for the purpose of scheduling a meeting, and the conversation does not meet the definition of a case.
- Mentor contacts a client for the purpose of following up or checking in, and the conversation does not meet the definition of a case.
- Mentors will not engage directly in the practice of law. This includes but is not limited to providing specific legal advice, representing an individual in litigation or any legal proceeding, or otherwise practicing law as defined by the state in which the Recipient is located. Those members of Recipient's staff who are qualified by experience and training to discuss legal issues may do so in a general way, but they must not engage in conduct that leads to the creation of any attorney-client relationship and must make appropriate disclaimers to that effect when providing such counseling and mentoring. SCORE may offer courses on business law issues, provided that legal topics are presented by individuals qualified by experience and training to address such topics.

Self-Assessment/Reflection: Consider why a contact with a client may or may not qualify as a mentoring session. Also, consider how even a brief exchange with a client may be of such value that it does qualify as a follow-up session.

➤ C. Mentor Standards

The following are SCORE's minimum standards for all SCORE Mentors.

- ❖ Mentors must accept all MRE assignments, both location based and expertise based selections
- ❖ Check email daily and use your scorevolunteer.org email account for all SCORE correspondence
- ❖ Complete annual Code of Ethics
- ❖ Update and maintain a keyword rich Mentor Profile
- ❖ Accept assigned Introductory Client Session
- ❖ Use SCORE resources and vet outside resources

Recommended:

- ❖ Attend 1 chapter meeting per quarter
- ❖ Complete 1-2 continued education/lifelong learning events annually
- ❖ Attend 1 SCORE webinar or workshop per quarter

IV. SLATE Mentoring Methodology

A. Introduction:

The SLATE Mentoring Methodology, developed by SCORE volunteers and experts in 2010, is foundational to SCORE mentoring. It guides us through the course of our mentoring sessions. It differentiates us and assures the delivery of consistently high-quality mentoring services.

Using one mentoring methodology across the organization helps to ensure consistent and effective delivery of the mentoring messages. SLATE is based on extensive client research and a 60+ year history of delivering client success.

You were trained in this methodology during the SCORE Training Mentor Certification course. This manual provides an on-going refresher and reference guide.

By remembering and using SLATE in every conversation, you create an environment in which the client can communicate the desired outcome or goal that you can work toward together.

What makes SCORE's mentoring methodology effective?

We are humans – We relate to one another as people. We all want to be understood and appreciated for who we are. As a SCORE mentor, we can listen to and connect with our clients in a way that is meaningful and supportive of them. SLATE and our mentoring methodology empower you to leverage your experience to be a good mentor.

Unique experiences – Approximately half of those clients who contact SCORE are already self-employed. SCORE mentors provide a unique experience, an interest in helping others succeed, and a commitment to a sustained mentoring relationship.

Relationships matter – As a SCORE mentor, what you’re really creating is the opportunity for enduring mentoring relationships with clients.

One size never fits all – One approach to mentoring will never fit all clients. SCORE’s mentoring methodology is designed to be flexible enough to adapt to every mentoring situation as well as to your unique style as a mentor.

Self-Assessment/Reflection: Why is it important to relate to our clients as people rather than just address the technicalities of business? What differentiates SCORE mentoring from using AI or doing an internet search for information?

B. SLATE Step-by-Step

SCORE mentors use a proven methodology to ensure quality and consistency. The five key components of SCORE’s mentoring methodology include the following:

- Stop and Suspend Judgment
- Listen and Learn
- Assess and Analyze
- Test Ideas and Teach with Tools
- Expectations Setting and Encouraging the Dream

As you can see, the first letter of each part of the methodology spells out the word SLATE. SCORE believes that SLATE is the perfect acronym for a mentoring methodology. When you begin each mentoring session, remember SLATE and how you should start each session with a clean SLATE. Be open to new possibilities. Be ready to consider new ideas. Start with a fresh, clean SLATE.

Let’s explore each part of SLATE in greater depth.

C. Stop and Suspend Judgment

Whether you are mentoring by phone, email, video conference, or in person, when you have the opportunity to connect with an entrepreneur, you are engaged in SCORE’s mission. Because it is such important work, the first part of the model is to STOP and focus all your attention completely in the moment and on the person you are mentoring.

When you stop and focus on the entrepreneur, you bring all of your attention to the present priority – your client – and you are better able to mentor the entrepreneur.

Suspending judgment means you refrain from casting judgment as it relates to a person's appearance, clothing, mannerisms, location, background, personal experience, ethnicity, and even the business idea. We acknowledge that not all ideas you hear will become great ideas, but respecting the person who brings the idea is an important part of your service as a SCORE volunteer.

Suspending judgment does not mean that you will never be able to offer your ideas and experience with regard to the business idea, but it does mean that you will suspend judgment long enough to listen, learn, ask questions, and come to a deeper understanding of the idea. Premature judgment interrupts the process of building rapport and creates a barrier. Remember, your goal is to establish a relationship with the entrepreneur, not jump to conclusions in the first few minutes of a mentoring session.

Self-Assessment/Reflection:

Will this step be easy or difficult for you? Why?

What will you need to do to be highly effective at this step?

D. Listen and Learn

When you are listening, you are not talking. You are not thinking about talking. You are not waiting for an opening to talk. SCORE clients have identified a leading source of disengagement occurs when the mentor is not listening to their needs and wants to interject his or her own agenda.

So, what are you listening for? Consider the words you are hearing. Is the entrepreneur expressing thoughts, feelings, beliefs, emotions, facts, data, or hearsay? Knowing what you're hearing will help you dig deeper with questions to help the entrepreneur learn and grow as a result of your mentorship.

Listen and Learn has at its heart the notion of creating effective dialogue. Mentoring is a relationship with an ongoing conversation. The best way to create a conversation and to bring important information to the surface is to use the power of questions.

1. Ask questions that make the entrepreneur think deeply. Ask Open ended question to get high gain answers
2. Ask questions that begin with how, what, and why, which helps elicit information to increase understanding. Additional open-ended phrases include: "tell me about," "describe," "explain" and "share." There is value in learning more: "Tell me more" "And..." "Continue..." "Go on..." "for example" "Such as" "In what way?" "How so?" "I'm curious, why's that?" "What else?" Asking these provides valuable additional information to help us Assess and Analyze.

Self-Assessment/Reflection:

Will this step be easy or difficult for you? Why?

What will you need to do to be highly effective at this step?

E. Assess and Analyze

By definition, “Assess” means to estimate the value of something. “Analyze” means to examine in detail to identify causes, key factors, and possible results.

After the Listen and Learn step is Assess and Analyze, which helps you focus on the information that has surfaced so far. Remember, you are not judging the ideas or the person. Your mission should be to help the entrepreneur assess and analyze the issues at hand. This is different from you assessing the ideas. It’s you helping the client assess and analyze the idea.

You can do this by using active listening skills, asking good questions, and creating a dialogue. As a mentor, you are asking questions that lead the entrepreneur to greater discoveries.

Great mentors don’t provide all the answers, but they do help the client think through things logically and methodically so that he or she can determine the best course of action. The best mentors are masters at helping the entrepreneur assess and analyze by uncovering information and discovering answers together.

Self-Assessment/Reflection:

Will this step be easy or difficult for you? Why?

What will you need to do to be highly effective at this step?

F. Test Ideas and Teach with Tools

Suggesting that a client test an idea is a powerful form of discovery. Testing an idea involves exploring an idea more fully, which typically yields more information and data. You are not lining up ideas and shooting them down. You are not asking the entrepreneur to defend the ideas so that you can judge them. At SCORE, we have discovered that the first idea an entrepreneur has is not always the idea the entrepreneur succeeds with. Testing is one way to help discover the best idea or to explore an idea more fully.

There are many ways to test an idea. The following are six ways to keep in mind. The Mentoring Methodology e-learning module goes into greater depth about each way.

1. You and the entrepreneur could engage in a dialogue using if/then statements to work an idea through its paces without actually implementing it.
2. The entrepreneur could talk to someone who has already tested a similar idea.

3. The entrepreneur could research other organizations that have implemented a similar idea.
4. The entrepreneur could survey potential customers to determine their desire for such a product or service and at what price.
5. Completing financial estimates for the idea allows the entrepreneur to test the idea for reasonableness against benchmarks and other industry information.
6. The entrepreneur could implement a phase or portion of the idea and track the results.

Once the entrepreneur tests an idea, he or she may need more information. That's when Teaching with Tools comes in. There are four types of tools to keep in mind:

1. First, there's YOU. As a mentor who brings a wealth of experience and a deep desire to be a faithful and wise advisor, you wear a unique tool belt full of tools. Share your expertise. Become the mentor your entrepreneur asks for by name and even recommends by name. Make sure your profile communicates your experience and skills well.
2. Second, there is score.org, SCORE's website. Sometimes we call it the SCORE online library because it's packed full of information and proven practices. Become a regular user and explorer of the SCORE website and direct entrepreneurs to it.
3. Third, there's the network of SCORE mentors. We always suggest you start closest to home in search of the expertise you need. However, your fellow SCORE mentors throughout the country are willing and able to lend a hand.
4. Fourth, there are the vast resources that lie outside of SCORE. Be careful about validating outside resources.

The most important thing to remember about Teaching with Tools is that you are equipping the entrepreneur to think, decide, and act based on information, data, and trends. That makes the entrepreneur smarter.

Self-Assessment/Reflection:

Will this step be easy or difficult for you? Why?

What will you need to do to be highly effective at this step?

G. Expectations Setting and Encouraging the Dream

Eventually, each mentoring session comes to a close, and it's important to wrap up the session in a way that creates momentum for moving forward. Regardless of whether the entrepreneur is going to explore more information on the SCORE website, meet with another entrepreneur, test an idea, or just do some more thinking, something positive and specific should come out of every mentoring session. SLATE helps you remember to end strong.

As a SCORE mentor, you have indicated a willingness and eagerness to create a sustained mentoring relationship with entrepreneurs. Expectations Setting helps keep the mentoring



relationship alive and moving forward. At the close of each mentoring session, ask the entrepreneur what he or she plans to do as a result of the mentoring session. Develop a plan of action together. Identify what will be done by when. Talk about it and put it to the **SMART** test.

SMART is an acronym for making sure that there are clear, actionable expectations at the close of the mentoring session.

S is for specific.

M is for measurable.

A is for attainability and action oriented.

R is for realistic.

T is for timely.

By putting expectations to the SMART test, you and the entrepreneur establish a relationship built on mutual accountability and activity that will produce momentum and results.

Great mentors help clients to make good business decisions. They help set a plan of action and encourage appropriate steps forward. They help clients assess each step and help them learn from each step. That's what you'll be doing as a SCORE mentor.

Once there are clear expectations, the right dose of encouragement to take the next steps, and the entrepreneur knows what to do next, then you're both ready to hit the ground running in your next mentoring session. Schedule this session before you close the current session. Be sure to schedule the next session in a timeframe that the client expects to complete their action items. One way to do this is to ask the client how long it will take them to complete between-session tasks.

Self-Assessment/Reflection:

Will this step be easy or difficult for you? Why?

What will you need to do to be highly effective at this step?

H. Provisional Observation and Co-Mentoring Sessions- SLATE in Action Mentoring Discussion Guide

Provisional mentors who are observing and/or co-mentoring with another experienced mentor will use this Guide to debrief the session immediately or soon after the session.

It is a learning tool and not a criticism. The objective is to learn from what has occurred during the session and reflect on how you might apply the SLATE model in your own mentoring.

Use this during your onboarding training and as a self-assessment at any time. The footnotes have links to where you can download your own copy. The following figure is an image of the Guide.

Mentoring With Clients: SLATE in Action Observation Discussion Guide

This guide helps new volunteers and their trainers assess how SLATE is employed during each of the co-mentoring training sessions. New volunteers should go through this guide with the mentors they observe and lead with, a coach or representative of the onboarding committee to foster meaningful learning dialogue to help the better understand the SLATE methodology. When you lead the session during co-mentoring you are the “mentor” in this observation.

S Stop and Suspend Judgment	<ul style="list-style-type: none"> • Was the purpose of the meeting clearly stated? • How did the mentor demonstrate his or her focused attention to the client? • In what ways did the mentor engage the client? • How did the mentor suspend judgment while the client spoke?
L Listen and Learn	<ul style="list-style-type: none"> • In what ways did the mentor exhibit active listening and ask questions to help the client think deeply? • How was the mentor learning more about the client's needs and objectives as time went along?
A Assess and Analyze	<ul style="list-style-type: none"> • How did the mentor use exploratory dialogue including questions to help the client assess the issues? • In what ways did the mentor help the client analyze the issues logically and methodically so that he or she could determine the best course of action?
T Test Ideas and Teach with Tools	<ul style="list-style-type: none"> • How did the mentor provide opportunities for testing to discover the best idea or to refine an idea? • What types of tools did the mentor suggest to expand the client's knowledge? • In what ways did the mentor help the client learn more about his or her idea as the session went along?
E Expectations Setting and Encourage the Dream	<ul style="list-style-type: none"> • How did the mentor end the session? • Were clear expectations and appropriate next steps determined? • In what ways did the mentor provide encouragement for entrepreneurship? • Did the mentor talk specifically about a next meeting?

CONSIDER:

1. Are there any areas of the SLATE methodology where you will have particular strengths?
2. Are there any elements of SLATE that might be areas of weakness for you? If so, how can you improve on these areas?
3. How will you ensure that you are applying the SLATE methodology throughout your mentoring?
4. SLATE is the mentoring process. What about the technical and business related content of mentoring?
 - a. Do you know how to find local and national SCORE mentors who can help you with this client in areas you are not expert?
 - b. Do you know how to find SCORE and other resources that you can use and/or refer the client to?
 - c. Are there areas that you can self-develop with workshops and other training resources such as those on the SCORE.org website and in the SCORE Volunteer Center?

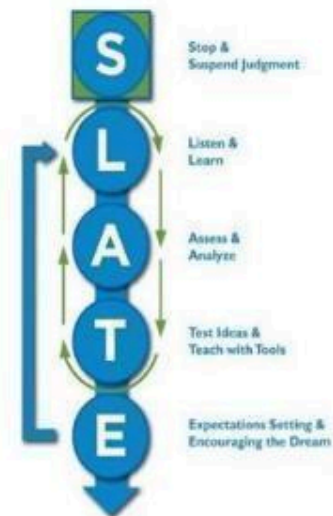


Figure 5 Mentoring With Clients: SLATE in Action Observation Discussion Guide

Self-Assessment/Reflection: How might you use the four “Consider” questions in the SLATE in Action Discussion Guide to help you with your mentor training and to improve as you gain more experience with clients?

V. Mentor Best Practices

This section discusses the steps of mentoring, highlighting best practices. You will see links and references to our client relationship management (CRM) technology system, Engage. Here are three very useful resource links.

- Engage Training Index [LINK](#) - This is an index of Engage training materials.
- Engage guide for the Client Mentoring Journey [LINK](#) - You'll find detailed step-by-step instructions for how to use Engage as you interact with clients.
- Engage guide for Key Mentoring Processes [LINK](#) - This guide contains the steps on how to accomplish common Mentor tasks in Engage. A How-to-Video is also provided after each topic.
- Integrated into our CRM is also a digital adoption platform called WalkMe. WalkMe provides interactive, role-specific guidance to assist all users in navigating tasks in Engage. [Click the WalkMe widget on the Engage homepage to access tasks and guides.](#)

A. Accepting a Mentoring Request

You will know that there is a Mentoring Request for you to accept when an email is sent to your SVO account. You may also look in the Engage Client Request – Need Action list to see the clients assigned to you that are waiting to be accepted. Prompt response to the client is important.

SCORE Policies and Procedures allow mentors to assist clients from any location within the United States and you are strongly encouraged to do so. SCORE's Client Engagement Surveys report that clients are flexible to be mentored via different methods of communication, at their time of need, and provide them with the specific areas of expertise requested. Clients choose expertise or location directly from score.org. Our goal of providing quality mentoring will then promote SCORE as a quality mentorship organization.

What sets SCORE apart is the vast network of expertise of mentors and resources shared across the country. Sharing our expertise in the [One SCORE](#) culture benefits our volunteers and clients alike.

Model Solution

The mentor who initially accepts the mentoring request is the client's “relationship manager.” Again, all mentors are expected to serve the first session regardless of their location. The

exception would be if they are on pause. All Mentors have the capacity to conduct the first mentoring session. In that session, you are setting up the foundation for the client and identifying the deeper questions that need to be asked. Then the next step may be scheduling a follow-on session with the client, adding a co-mentor, or transferring the client to another mentor. Since that client will stay in the original mentor's client list, there is the ability to continue to assist them when needed.

In transitioning a client to a new mentor or when bringing in a co-mentor, best practice is to inform both the new mentor and the client why another expert is being brought in. This is a good time to share SCORE's mission and highlight all that SCORE has to offer in terms of people and resources.

B. Responding to a Mentoring Request: The First Communications with Clients

1. How to Establish a Connection

The speed and tone of your response set the stage for the client's connection to you and SCORE. The fact is that delayed responses send the wrong message about SCORE as a service organization. Experience also shows that clients are much less likely to connect with SCORE if the response is delayed.

SCORE's procedures ask that clients be contacted within 48 hours of receiving the Mentoring Request Case (historically referred to as an MRE). If there is no response, attempt to contact them again an additional two times within the next two weeks. Using both email and text or phone call improves client response.

Accepting a mentoring request case will require you to send an initial email to the client through Engage. It is best to follow-up the email with a text message or telephone call as preferred by the client. Read on for suggestions for messages to use.

[Link to Engage guide for Key Mentoring Processes](#)

- Some clients who submit a request never meet with a mentor. They never receive the mentor's initial e-mail contact (it goes to spam). They change their mind. Change client status to Withdrawn.
- Mentors should make at least 2 more attempts (3 total) to schedule an appointment (record each attempt as Notes). It is ideal to have one contact attempt be phone or text.
- Do NOT create a session if you have not had an exchange with the client. This will generate a NPS survey to the client which usually results in a very negative review as there has not been any contact. Attempts to contact clients are not mentoring sessions. Enter them only as Notes.

NPS Survey Rating of Zero, Client Comment: I was never contacted by anyone.

NPS Survey Rating of Zero, Client Comment: I really wanted to speak to somebody, but all I got was a bunch of information and links that I could have looked up myself, and that I already know about.

- Change the mentoring request status to "No Response from Client" if there is no response after 3 attempts (email, text or telephone call). If a client does reach out after their status has been changed, the status can be changed to In Progress. Here is a [LINK](#) to the Engage instructions.

2. Client First Contact Messaging – With Examples

Your objectives at this stage: Receive a response from the client, schedule an appointment, or start a phone, text or email conversation. You can also talk about the differentiators and value of SCORE and yourself a bit to help overcome uncertainty on their part.

What you say and how you say it makes a difference in how your messages are received. A best practice is to have a pre-written text document on your desktop or elsewhere on your computer so you can copy and paste the body of your message with your signature block into your acceptance response in Engage. Here are some example email formats and scripts to consider. You can adjust this for phone conversations.

The following example is short and to the point. It also offers specific times that the mentor is available. Some Mentors use their SVO Google calendar, Calendly or other systems. Either way, Mentors should include those scheduling links in the email to the client. The signature provides contact information, the profile, and a resource link.

FIRST CONTACT EMAIL SENT THROUGH ENGAGE – General Outline

The subject line from Engage is: Message from your SCORE Mentor

Salutation given by Engage: Hello [client]

Thank them for reaching out to SCORE for our free, confidential, and neutral SCORE mentoring. (This sells SCORE and mentoring services) Refer to their MRE question. (It is important to remind them someplace in the message)

Tell them a bit about who you are and how SCORE can help.

Tell them how you can meet and ask for an appointment time.

Include a link to your calendar if you are encouraging self-scheduling.

Sign off with a signature block with your name, title, email, and other contact information. Include a link to your public SCORE profile.

Copy and paste their MRE question here unless you have covered it well in the body of the message.

An Example first contact email/text from District 373

Hi Janice

I received your request for a mentor to discuss hiring an employee, advice on generating revenue from book sales and producing a TV talk show. I am available to meet clients virtually. I prefer Zoom.

I have appointments available on Jan 26 (11 am or 1 pm), or Feb 1 (9 am or 2 pm). Assuming one of these days is convenient for you, send me an e-mail with proposed times, and I will schedule an appointment. If you need to cancel your appointment, please e-mail me at archie.miller@scorevolunteer.org.

I look forward to meeting with you.

Archie

Archie Miller

Certified Mentor, SCORE Southern Maryland

Cell: 410.123.4567 | archie.miller@scorevolunteer.org

Website: <https://www.score.org/somd/profile/archie-miller>

Webinars: <https://www.score.org/somd/local-workshops>

The following example starts with a short introduction to establish credentials. It then goes on to explain how we can connect and ask them to suggest time windows for a meeting that works for them. It includes the Mentoring Request Case question at the end.

An Example from Chapter 45 – Buffalo Niagara

Hello [client]

I am a SCORE Certified Mentor who has been given your request for [specific from the Mentoring Request Case] small business assistance. I will be very happy to assist you. I have over 40 years of business experience including more than half of that time as a small business owner. I have worked with hundreds of clients giving our free, confidential, and neutral SCORE mentoring.

I meet with clients virtually by email or video. I prefer video and my clients really like it as well. I provide a Zoom or Google video meeting link and you are just a click away from connecting.

Our next step is to find a date and time to meet. Once we have that I will send you the video link. OR let me know if you prefer to work through email or phone instead.

Please let me know what days and times work for you and I will do my best to accommodate your schedule. I do all of my mentoring by appointment.

I look forward to hearing from you and assisting you with your business.

Best regards,

First name

First Last Name

SCORE Certified Mentor

your@scorevolunteer.org - email is my preferred contact method

Google Voice number - text or voice message only

(555) 580-4564 Personal cell phone - leave a message or text and I will respond ASAP

My SCORE profile:

<https://www.score.org/buffaloniagara/profile/steven-martin>

Your Question: [copy and paste from the Engage record]

Self-Assessment/Reflection: What would you say to let the client know that you have seen their question and are in a position to help them? How would you communicate your preferences and availability for making an appointment?

3. Avoid barriers to connecting with clients

It is very important to avoid adding steps and barriers to meeting with the client. Our goal is to get a connection, schedule a meeting, and serve the client. Our human-to-human relationships are what makes SCORE mentoring so powerful and differentiates us from a Bot, AI, or search engine.

You may wonder why the client intake form asks for so little information. You may wonder why we do not make them fill out a lengthy form telling us who they are and what they want.

The answer is simple: It is a fact that every single pre-qualification question or hurdle diminishes the likelihood that they will complete their request online or respond to your email. We want people to contact us. Your objectives at this stage are to get a response from the client, schedule an appointment, or start an email conversation

DO:

- Encourage them to connect so you can talk and work through SLATE with them
- If you have a pre-meeting discovery call, you might ask them to clarify their question.
- Be flexible about scheduling an appointment to meet their needs if at all possible

DO NOT:

- Ask them extensive questions in advance of having had a conversation with them
- Send them to a webinar or workshop before having met
- Send them unsolicited pre-work
- Ask for their resume or business plan
- Utilize a contractor or non-SCORE Mentor to gather additional Client information
- Enter a contact email as a session. It will trigger the NPS survey and is likely to disappoint the client.

NPS Survey Rating of Zero, Client

Comment: Mentor sent me to the resources on the website, which I have already looked over and was hoping to receive information from a live person.

C. Getting Ready: Preparation for a Client Meeting

It helps to prepare before a meeting with a client. You will be more confident and can be ready to listen, assess, and teach with tools. Be aware that the Mentoring Request Case (historically referred to as an MRE) question is only the tip of the iceberg and your exploratory and open ended questions may take the meeting conversation in a different direction than you anticipate.

Here are some suggestions for you.

NPS Survey Rating of Ten, Client

Comment: It was a very thorough call. I felt like I had my mentor's full head space and time. It was obvious he was prepped to [be] with a mentee, due to his introduction and knowledge of [the]question I previously asked. The call was not rushed] and informative. It was the right amount of reality and kickstart I needed.

- Read the Mentoring Request Case for new clients to review their request and to learn where they are geographically located..
- If the client is out of state, for example, do an internet search to see what resources might help them with their questions. For example, the Departments of State for states have website information on legal entities.
- Consider what SCORE and other resources you might have handy in case they might be appropriate for the client. Be careful not to force the client to fit your preparation so listening is vital.
- If you think that you might need to bring in co-mentors with specific skills and experience to answer the question, do a pre-search in Engage to see who might be a good fit.
- For returning clients, review your past session notes, other communications or session notes from other mentors.
- If you have been added to a mentoring team or are picking up a client from another mentor, run the Session Activity Report in Engage to review all prior session notes.
- Refresh your use of SLATE
- Send the client appointment reminders by text and/or email in advance. The “Email Guests” feature in Google Calendar makes this quick and easy.
- If you are using video, be online about 10 minutes in advance to test your connection and be ready when co-mentors and your client arrive.

Self-Assessment/Reflection: What preparation will you do to greet new clients professionally and to pick up the conversation with returning clients.

D. Mentoring Sessions – First & Repeat

The first session with a new client will determine their opinion of you as a mentor, and the SCORE organization which they will share with others. It is important that we conduct ourselves professionally at all times in service of the client.

The following is a guide for in-person and virtual mentoring sessions to help you give the client a good experience. Note that it is a good practice to send the client reminders a day or two in advance and on the day. Your SCORE Google Calendar allows you to manually send reminder emails including the video links. See the Support Center for current guidance on the Google Calendar and other calendar options.

First session objectives include the following:

1. Build trust. Relate to the client in such a way that they are comfortable with you and SCORE. Clients come to us with questions, concerns, dreams, and hopes that they want to explore with someone who is understanding, empathetic, helpful, and supportive. That is why SLATE is so important.

Clients may not remember everything you tell them but they will certainly remember how you make them feel.

2. Schedule the next meeting to connect them with other Mentors if needed, SCORE resources, and outside resources to help them move forward and/or review the actions that come out of the first meeting.

Here is a suggested sequence that starts with the assumption that you may have a Provisional or other co-mentor in the meeting with you. If not, just adjust the introduction as appropriate.

1. Join the meeting early with your co-mentors to remind everyone of how you are going to lead the session, how they can contribute, and what the meeting guidelines are.
2. Greet the client when they join the meeting. Thank them for reaching out to SCORE and let them know that we are here to help them.
3. Ask the client how they came to SCORE and ask them what they would like to accomplish. Ease into the conversation.
4. As the lead mentor, keep the introductions simple and short. Here is an example: “Mentor A is joining us today bringing their years of experience, I have experience in _____. SCORE volunteers use a team concept, so as your needs evolve, new mentors can be added over time.
5. Depending on the context, consider using language like this to set the stage for the meeting. “Our objective today is to introduce you to SCORE, understand your questions and goals, give you answers and guidance, help you to decide on the next steps you can take, give you suggested tools and resources, and set an appointment for our next meeting. How does that work for you?”
6. Talk about SCORE now or before #4. Here is an example script:

Example Meeting Agenda

Introductions 5 min

Get to know client 10- min

Discuss opportunity/problem 30 min

Propose client and mentor actions 10 min

Summarize and schedule next meeting 5 min

Send follow-up email

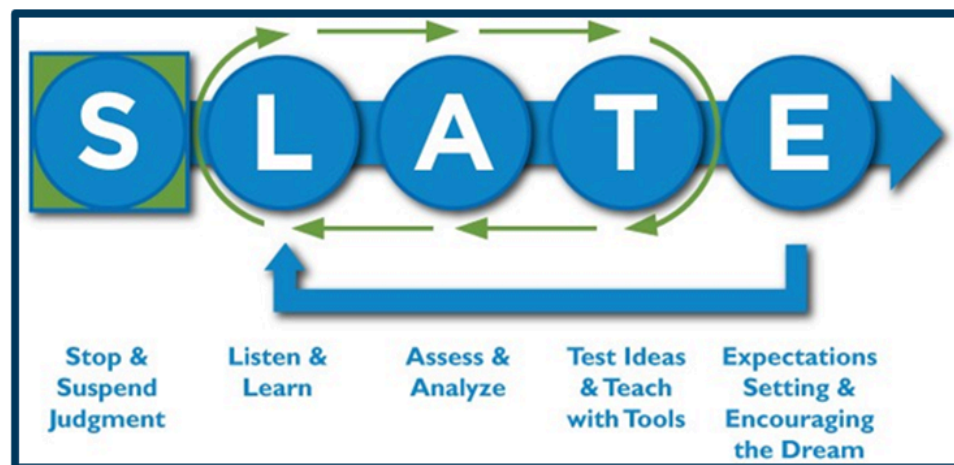
“I/we have read your request. Please tell me how you came to find out about SCORE. [Their answer] Would you like to know more? [Usually “yes”] SCORE is a resource partner to the US Small Business Administration. We are a non-profit with 60 years of experience helping more than 17 million entrepreneurs just like you. Our 10,000 volunteers all have some real-world business experience that we share with you. Our mission is to foster vibrant small business communities through mentoring and education. Our education is through a vast library of free resources on our website, score.org and free or low-cost workshops and webinars run by local chapters. Our mentoring, which is what we are doing today, is free, confidential within SCORE, and neutral. We sign a code of ethics every year to affirm that. You are our only interest.”

Alternative explanation language:

“We are a national non-profit resource partner of the SBA assisting small business owners with no-cost confidential mentoring, educational workshops and resources to help start and grow their businesses.”

“Our role as mentors is to help you make the best possible business decisions you can make for your future. How does that sound?”

7. Repeat sessions should start with checking in with the client. Consider asking them how they feel or think about what they have learned so far, their progress against the objectives they set in the last session and if they need clarification on anything. This is an opportunity for you to understand if they think they are on track. As clients learn more and think differently, you can work together to chart a new course of discovery and action.
8. Use SLATE to guide the meeting. At several points during the meeting ask, “Is this helpful for you?” Adjust the conversation as appropriate. Remember to listen far more than you speak. Use questions to help you to learn and assess.



9. NOTE: Do not try to “boil the ocean.” **Do not make this a one-and-done session.** Their first questions are the tip of the iceberg. You can help them by setting up follow-on meetings with yourself and, if appropriate, bringing in team members with specialties the client needs.

Remember: You are not the sole source for mentoring the client. The goal of One SCORE is to have other mentors help you from all across the country. That is what our other mentors, SCORE resources, and outside resources are for. As the lead mentor in a first session, you can help them to connect to what they need beyond your expertise.

Meet the client where they are and help them to get to where they want to go.

10. When you are at the *T Teach with Tools* stage offer to send them links to or copies of specific resources that you think may be of value. Ask them if they would like for you to do that. See the Teaching with Tools section of this document.
11. Ask them what they can work on between now and the next meeting. Some will have a clear idea already. Others may want some suggestions. Ask if they feel that this will be helpful.

Ask them if they want to meet next week or the following week. Note that this form of question asks for a date and not **if** they want to meet. Assume that they will and proceed in that manner. Let them know that they set the pace but your experience shows that having meetings on the calendar not only preserves the time but links also serves as an incentive to make progress.

Book the appointment on the spot if you can open your [SCORE Google calendar](#) or other utilized calendars and get it done right then.

12. Remind them of what you are going to do with your follow-up email and what their agreed homework is.

Top performing mentors have found that when they take notes during the session and review the reed action items with their client during the meeting close, that their clients not only are appreciative but they are more likely to make progress.

13. Let them know that you are making notes in the confidential SCORE database so we and subsequent mentors can keep the progress going. “When we do that, it will trigger a very short 5-question quality survey that does not come from me. Please be aware and, if you can, take a moment and complete the survey. Your feedback is important.”
14. Thank them for attending the session and that SCORE's mission is to help them grow a vibrant small business.

Closing the Meeting

How you wrap up the meeting is as important as your opening. You are reminding them of the progress you have made, the next steps you are both going to take, and you have set the date for the next meeting. Since you have asked them during the meeting if this is helping them, you can remind them of that. You can reiterate that you and the rest of the SCORE team of mentors are here to help them achieve their goals.

Encourage their dream of becoming an entrepreneur through SCORE mentoring and education...even if they decide that this first idea may not be viable.

End with the client feeling that you have understood and appreciated them.

15. Enter the session notes into Engage. If you are working with a Provisional and you have the time, do the session notes live with them on the spot.
16. It is important that you send your follow-up email to the client. You may use the Engage option to send your session notes directly from Engage or you may send a separate email. Be sure to include any resource links and attachments you have promised as well as advice on the topics and action items that you have discussed and agreed to. Note that your follow up email can and oftentimes is the same as what you enter into Session Notes.

If a follow-up email contains new mentoring advice, it may be a new email session. Refer to the definition of a mentoring session in Section III above to determine what constitutes a session (note: in this case, a follow-on session).

Self-Assessment/Reflection: How can you pay attention to the client’s words, body language, and reactions to make sure that the session is going well from their perspective?
How might you stay true to the spirit and intent of SLATE to relate to the client in a positive way while adding your own voice to the conversation?



E. Entering Your Session Notes in Engage

“The job is not done until the paperwork is complete.” This is especially true in mentoring.

Purpose: This guidance suggests what to enter into client session notes to ensure that you and subsequent mentors can serve the client “For the life of your business” as part of our brand promise. Also, entering the session provides evidence of a client meeting – thus ensuring professional liability coverage (Title 42 United States Code, Section 14501) for mentors. These records of mentoring sessions also track our client impacts which we use to report back to key stakeholders such as Congress as other partners.

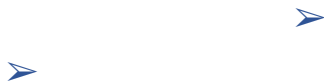
- Write for the future reader.
- Include key points so that you or another mentor can pick up the case whenever the last session was held and move forward.
- Notes may include transactional business details but may also speak to the goals and ambitions of the client.
- Session notes and attachments should not include client-sensitive data such as government-issued identifications, personal affiliations (political, religious, etc.), and other sensitive records. For more information on protecting client information, read the [Personal Information Protection Policy](#)

- Include what you recommended and why.
- Note what their homework is.
- Note what your follow-up homework is and include the follow-up email as part of the session notes if it is only references and not a session. Some follow-up emails may contain enough new advice to constitute a separate session that should be recorded as a separate follow-on session.
- End the notes with what the client said about the meeting and the date and time of your next appointment.
- Do not enter personal, judgmental, or hard language as this is a permanent record that can be read by many.

With the proliferation of Artificial Intelligence (AI) tools, it is possible to use some SCORE approved transcription tools at this [link](#). It is important to understand that AI is in a dynamic state of flux so please check the approved list before use. You still must audit, check, and edit materials for accuracy before publishing the final notes.

Training and familiarity with the tools are also important for Policy compliance. See this [Artificial Intelligence](#) section of this document for more guidance and resources.

Self-Assessment/Reflection: What will you want to know when you prepare for your next meeting with a client whether it is next week or next year?
 What do you think co-mentors or the next lead mentor needs to know about the client from the beginning of their relationship with the client?



➤ **F. Following-up and Reconnecting with Clients**

Client Engagement Survey results indicate that clients are more satisfied when their SCORE mentor follows up with them. The following figure shows the dramatic positive difference in the client experience from mentor follow-up. This is extremely important, not only follow-up to current activity but "how's it going" follow-up a month or two later.

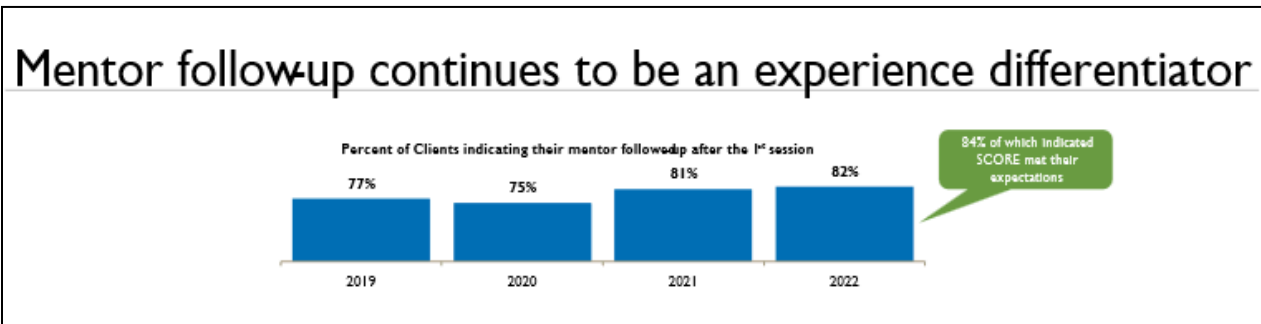


Figure 6 Mentor follow-up SCORE FY 2022 Client Engagement Survey

Here are suggestions for following up with clients:

- Promptly email them with the resources or information you indicated you would provide when you last met.
- Send them appointment reminders as appropriate. Reminders are a proven practice that will increase the likelihood of your client making the appointment. Or it will trigger a response from them to reschedule. You can take advantage of the “Schedule Send” feature of your SVO email to prepare reminders.
- Forward them workshop announcements, articles, and other pieces that you think may be of interest to them. See the guidance on what constitutes an email that should be recorded as a session. Not every message does qualify.
- If you have not had contact in a while, check in with them, ask how they are doing, reiterate your desire to help them, and suggest another meeting.
- TIP: Best or Proven Practice: Mentors download recent client data from the BIRT Individual SCORE Volunteer Performance Report, review it, select clients who could use a reminder, and send a BCC email to that list. That email could feature something of business interest and/or focus on a SCORE resource. Add a reminder that you and the SCORE team are here to assist them. Ask to schedule follow-on sessions or at least communicate by email. How to Run a BIRT Report.

Self-Assessment/Reflection: How can you manage your schedule to invest time even before you meet with the client and for following through after the meeting?
In what ways might you foster and maintain a mentoring relationship with your clients?

F. Teaching With Tools – SCORE and Other Resources

Here are practical approaches and considerations for being an excellent practitioner of the SLATE step of [Test Ideas and Teach With Tools](#).

There is so much information available online today that it can be very hard for clients and mentors to find what they need and to know what to trust. We mentors can make a real difference for our clients by assessing their needs and curating tools and resources that will help them. These resources are an integral part of good mentoring. Providing resources to guide homework in your follow-up emails is also a positive way to encourage follow-on sessions.

Clients will appreciate you and benefit from your giving them what they need when they need it. That may be a single worksheet rather than an entire course. Consider the following when you curate resources for your clients:

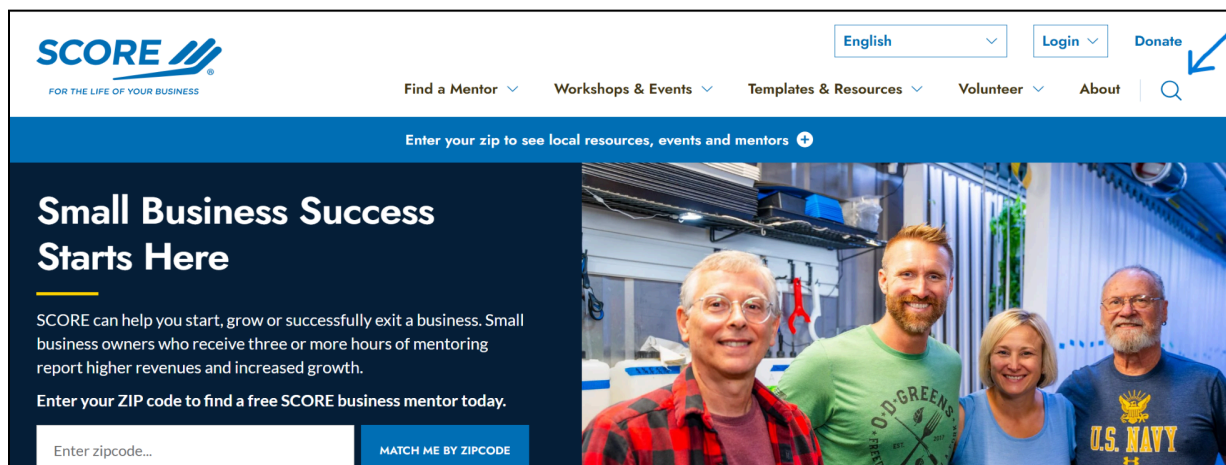
- Does it help them address their questions and move toward their goals?
- Is it what they need right now considering where they are as an entrepreneur and the stage of their business?
- Is the material accurate, of good quality and from a trusted source?
- Will they be able to understand and use it (with your assistance as appropriate)?
- Does this support your mentoring relationship?

1. How to Find SCORE Resources

SCORE is a first source because we know and trust the authors. With a wealth of resources—including mentoring services, workshops, templates, and more — SCORE.org is a valuable tool for entrepreneurs and small business owners.

You and your clients have access to evergreen content as well as the upcoming hundreds of new workshops and events that we offer every year. Content is constantly being refreshed with new and updated information.

You are encouraged to spend a few minutes with this excellent step-by-step guide for searching our website at this [LINK](#) in our Support Center. It will help you navigate and effectively search for the information and support you need on SCORE.org.



- You can use the website search to find the tools your client needs. The website search is indicated by a magnifying glass icon in the main navigation. Enter a keyword or keyword string to find published pages that contain the word(s).
 - o Once you enter a keyword and hit enter, you'll see a list of results that are the closest match. These results contain a variety of content formats, from written text

to videos to templates and everything in between. Use the search filters to narrow the results.

- You can filter by content type (the type page that was used to publish the content), topic, format, industry, entrepreneur type, business stage and language.
- The keyword(s) searched will appear in bold in the search results listing. This will give you a sense of the content to understand the relevance of the result to your search.
- In addition to the website search, there is a search function built into each content type. In other words, if you know your client's learning preferences, you can search within that specific content type or format.
 - Search our workshops, events and online courses through the workshop search: www.score.org/business-education.
 - Search our educational resources in the templates and resource search. You can use the website search to find the tools your client needs. The website search is www.score.org/templates-resources.
 - Find subject matter expertise using our mentor search: www.score.org/search-mentors. You can also use the search in Engage to look for mentors.
 - Find examples of how SCORE helped clients in a similar industry or with a similar topic using our success stories search: www.score.org/success-stories-search.
 - There are other search experiences on the site, including a search within each industry term, business stage, and entrepreneur types and business topics.
- You can also use search engines such as Google, Bing or others to search SCORE.org. Type the following into the search field: [the keyword or phrase you are looking for] site:score.org
This instructs the search engine to look only on score.org
- Ask your fellow mentors to give you suggestions based on their experience and research.
- Build your own list of bookmarked SCORE resources for easy reference
- Some chapters and districts are collecting and curating local and regional electronic resources that can help you with local needs. Check with your Coach, chapter leadership and peers.

2. SCORE Content Selection - Meeting Client Needs

You will probably consider the following factors as you assess your client's needs and curate resources for them. Here are some suggestions to get you started and to supplement your searches on score.org. The good news is that the search filters and the top navigation bar on the site facilitate your search.

Here are some Go-To Resources for you to bookmark:

The Startup Roadmap has 12 Modules covering a business evaluation and startup. The modules are also extremely helpful for clients who are

Use resources to supplement the mentoring experience rather than to replace your engagement with the client.

already in business and can use a tune-up on various elements of business operations such as branding, marketing, planning and so forth.

The [Startup Roadmap Checklist](#) lists the steps and worksheets along with suggested homework. You can get these and more from the [Startup Roadmap Mentor Guide](#). This excellent document guides you through the entire process so you can help your client with confidence and professionalism. It is the primary resource on the support center for mentors using the Startup Roadmap.

Consider giving them one of the first worksheets or a later one if that is better suited to where they are on the road.

For example, rather than just giving them the link to [The Startup Roadmap](#) with instructions to start the course and get back to you if they have any questions, give them an easier starting point. Where they go in Startup depends on what they want help with. Send them the link to the appropriate chapter.

Business Planning, Financial, Marketing, Sales, and Management Templates for All Stages

Access our collection of user-friendly templates for business planning, finance, sales, marketing, and management, designed to assist you in developing strategies for either launching a new business venture or expanding an existing one. Here is a [LINK](#) to the excellent Template Gallery.

Resource Hubs provide curated resources for business owners across all business stages, topics, industries and entrepreneur demographics. These hubs are available at this [LINK](#).

■ 3. Resources Beyond SCORE for Teaching with Tools

1. The [SBA](#) has a wealth of information on its small business programs and resources. Here is a [LINK](#) to the SBA resource partner page.
2. Ideally your chapter, district and region will have a curated list of resources that are particular to your community. Talk to your peers and community partners to learn more about what is available and how to find it.
3. If you are working with a client outside of your location, it is relatively easy to find out business resources and fundamentals with an internet search. There are common site types to search:
 - a. State websites will often offer business resources through a portal. They do their best to facilitate the legal formation and operation of businesses within their jurisdiction.
 - b. Secretaries of State typically handle corporations, LLC's, partnerships and other business entities. They also often give access to searches, registrations and regulations. Entity formation regulations vary widely from state to state. In some states it can all be done online in a few hours for less than \$100. In other states it can take months to complete and cost \$1,000 or more.

- c. County Clerks may handle DBA's and are often a source of information for local regulations and other resource entities.
- d. City and Town offices are also sources of information for their zoning, building, operating, business license regulations and other resource entities.
- e. Local libraries are a great source of information for small businesses, whether it's setting up a business, finding local store front locations, industry trends, and market analysis. Many libraries (primarily, the main library, not branches) have dedicated staff focused on assisting small businesses with business research.

4. Artificial Intelligence - AI

a. Policy

Given the dynamic nature of Artificial Intelligence tool development, it is imperative that we be very careful with how we use it with and for our clients and how we advise them relative to their use.

The governing Policy and guidance is laid out in the document at this [LINK](#). The Purpose is reproduced here but the details reside in the primary source Policy document which is owned and maintained by HQ.

- [SCORE Generative Artificial Intelligence \(AI\) Ethical Use Policy](#)

“Generative artificial intelligence (“AI”) is a transformational technology that will become an increasingly helpful tool for SCORE, its partners, and its clients. AI's safe, ethical, and responsible use in our work will enhance SCORE's ability to serve its clients and advance the public interest.

SCORE recognizes that the responsible use of AI must always be subject to human judgment and oversight to avoid misuse and inadvertent risks of harm. Technology is rapidly evolving, and many professionals and organizations are exploring the potential of generative AI and its current issues and longer-term implications.

SCORE Association (“SCORE”) is committed to harnessing the power of AI to advance the SCORE mission while upholding ethical standards and prioritizing responsibility. This AI policy aims to define and outline guidelines for using AI to perform work and emphasize the importance of individual author responsibility in all AI-generated outputs.

This Policy establishes the fundamental ethical principles of SCORE for the safe and responsible use of generative AI and related technology and tools. This Policy will emphasize the importance of individual author responsibility in all AI-generated outputs. SCORE policies, procedures, and best-practice guides must adhere to these principles.”

To review SCORE's full policy on AI see this [section](#) of the Policy and Procedures on the Support Center.

b. Artificial Intelligence - AI Resources for Mentors

- i. [SCORE Approved AI tools list](#)
- ii. Training and familiarity with the tools are important. The best source of information in 2025 is the AI Community of Practice website which you can access using this [link](#).
- iii. [AI Tips, Use Cases and Limitations](#) A good list of Frequently Asked Questions
- iv. [SCORE Mentor AI Chat Prompts - Greatest Hits](#)

➤ **H. Finding Supporting Mentors to Assist Clients**

It all starts with a well-written mentor profile. Writing a good SCORE profile is the foundation for being found in the way you want clients and your peers to find you. The SCORE [Profile Best Practices Guidelines](#) and associated materials help you highlight your experience, expertise and interests into easily searchable information within Engage.

Use these steps and resources to find and recruit co-mentors.

- Ask your chapter peers for recommendations.
- Use the [How To: Search in Engage](#) guide in the support center. It is an excellent step-by-step guide with screenshots and tips on how to find clients and volunteers.
- You can search Volunteers by any of the following parameters: Contact Name, Contact Type, Email Address, Phone Number, Account Name (Chapter Name), Position, Classification, Expertise, any text entered in the Subject Matter Expert field, any text entered in the Profile Summary (How Can You Help SCORE Clients?).
- Start the search by entering one of the above characteristics in the global search bar:



- After the system does a full lookup search on all searchable fields in Engage, you will see all matching results. Results are sorted by relevance to show users the best results at the top. You can sort these results by clicking the column headers.

- You can filter by classification such as Mentor or Subject Matter Expert (SME) and other characteristics in the left-hand column of the search results page.
- When you have numerous matches, you can refine your search by using any or all the fields found under Refine By.
 - These fields include: Contact Name, Contact Type, Email Address, Phone Number, Account Name (Chapter Name), Position, Classification, Expertise, any text entered in the Subject Matter Expert field, any text entered in the Profile Summary (How Can You Help SCORE Clients?)

- NOTE: Using the “Subject Matter Expertise” filter on the search list will find those mentors who have that they are experts in that specific area. It is important for you to keep this field current on your profile. This is a screen shot from a profile page.

Any keyword entered in this field will be searchable for other volunteers when looking for an expert in Engage and will also be displayed to the CIC when assigning client requests. This information is not searchable to clients on SCORE.org.

Subject Matter Expertise ⓘ

- Open the mentor profile in Engage and look at it to see if they fit what you are looking for. Here are some things to look at:
 - Does their experience support what your client needs?
 - Are they taking clients? Look at how many clients they have had in the last 60 days. It is possible that even if they are not “taking clients” they may be willing to help you with your client.
 - Are their Evaluations favorable?
- One practical tip is to hover your mouse over the names on the list and right-click to open the profiles in new tabs. That keeps your search results open in a tab and easy to return to.
- Once you have identified one or more mentors of interest, you have a couple of options.
 - In some cases, you may want to send the client links to several public mentor profiles and ask them if they have a preference.
 - If you are making the choice, here is a courteous way to reach out to the mentors:
 - Send them an email with a summary of the case, tell them why and how they might help, and ask them if you could add them to the team to help the client. Only team members can see the Engage records and add case notes.
 - Discuss if the session with the client should be a co-Mentoring session with you or if the other Mentor should meet with the client on their own, as a Team Member. (To indicate this Mentor is a team member see this [link](#).)
 - Thank them in advance for their assistance. Ask for a response.
 - Wait for their reply and act accordingly.
- It is proven best practice for you to do this search and matching for your clients. Please do not just send them to the website and tell them to find a match on their own. Your search

will show more results than what a client can search for and you will demonstrate your efforts to provide assistance. Co-mentor guidelines for both lead and co-mentor¹

Co-mentoring can be a great experience for both mentors and clients. Clients will feel more comfortable when there is one session leader. Here are some guidelines for how to lead joint sessions.

- Agree on roles with your co-mentors. Make sure everyone understands what your agenda is and when and how they can contribute.
- As a lead mentor, you set the tone and moderate the conduct of the meeting.
- Co-mentors should know to look for you to invite them to contribute or when to ask them if you can add. Mentors who have been working together for a while develop a good rhythm.
- Consider setting up a Google Calendar for co-mentoring. [LINK](#) to a training module.
- Make sure that everyone is working in service of the client.
- Keep the meeting on track and on SLATE. Do not let yourself or your co-mentors take it off-topic. War stories and tangential issues can be tempting distractions.
- You will wrap up the meeting with the client following best practices.
- If possible, after the client has left the meeting, agree on session notes to enter into Engage.

I. Co-mentoring with Provisionals in Training

Your role as a co-mentor for a Provisional is to teach them how to meet with new clients in actual mentoring sessions and how to employ SLATE and other best practices throughout the session to meet the client's needs. As an experienced Mentor, you can model best practices and further their training and onboarding.



Co-mentoring with Provisionals is an excellent way to support two of our SCORE value pillars: **Relationships Matter** and **Volunteers Matter**. It also expands your SCORE peer network.

A minimum of 3 co-mentoring sessions are required for Provisionals. They may need or ask for more sessions to gain experience and confidence. In the ideal case, the Provisional will co-mentor with

several experienced Mentors.

1

It is important that the Co-Mentor sets expectations with the Provisional so they understand their role in each of the 3 co-mentoring sessions. If it is their first session, the Provisional should be simply observing. In their second and third session, the Provisional should be welcomed to provide some input along with the Co-Mentor.

Here is an optimal sequence for meeting with a Provisional, conducting a joint session with a client, debriefing, and entering the session notes into Engage.

1. The Regional Volunteer Intake Coordinator (RVIC) or Coach introduces you as a Mentor by email, phone, or text.
2. Before any sessions you have a phone conversation, in-person, or a video meeting with the Provisional to get to know them and talk about how you [prepare for first sessions](#) and conduct your mentoring sessions.
 - a. Review and/or refer them to [The SLATE in Action Observation Discussion Guide](#) if they are not yet familiar with it. You will both use this after the co-mentoring session.
 - b. Set expectations for what their role will be in the mentoring session based on whether this is the Provisional's first, second or third co-mentoring session.
3. When you have a new client, establish a meeting time that works for the client and the Provisional if possible.
4. After the session and preferably on video, debrief the session using [The SLATE in Action Observation Discussion Guide](#). Plan a half hour in addition to the session time to do this and enter session notes.
5. Log onto Engage and go through the process of completing the session notes. Explain why the notes are important and have the Provisional suggest what should be said. Make sure to include the Provisional as a co-mentor in the record. [See Session Notes Guidance](#).
6. Answer the Provisional's questions and guide them to resources as appropriate.
7. Offer to keep them on the mentoring team with this client if they would like more experience and include them in scheduling the next session. You may do this during the session closing when you schedule the client's next meeting.
8. Check back with the Coach if appropriate to suggest additional support or training. Let the Coach know if the Provisional asks for or needs more co-mentoring sessions.

Desired Outcomes:

Provisionals are confident in being able to conduct mentoring sessions of high quality in service to the clients. They can establish their voice within the SLATE framework.

The provisional now has connections with you and other experienced mentors to assist them with building their social relationship with the chapter and helping them with SCORE questions.

Self-Assessment/Reflection: In what ways might you support Provisional volunteers in their journey to becoming skilled SCORE mentors?

➤ J. Mentoring Type – In-Person, Video, Phone, Email – Nuances & How To’s

Following SLATE best practices, the professional and respectful actions of the mentor set an open and welcoming environment for developing a business relationship with the client.

When choosing a mentoring type, consider the client’s preference first in determining the type. Your goal is to conduct an effective, confidential, and safe mentoring session.

1. In-Person Mentoring

For some people, having face to face meetings allow for deeper, more meaningful relationships to grow.

- Before the Meeting
 - Plan to meet in a safe location: office or public facility
 - Respect confidentiality by choosing the location with that in mind
 - Confirm the location works for both of you
 - Exchange phone numbers and agree on a communication plan
 - Advise the client how they can identify you. Showing SCORE branded material is one idea.
- During the Meeting
 - Be conscious of the client's reaction to any greeting contact.
 - Maintain eye contact and use listening skills
 - Be aware of your body language throughout the session.
 - Upon conclusion of the session, ensure all documents or materials are removed.

2. Video Mentoring

SCORE uses both Zoom and Google Meet video meeting platforms. You can configure your Google calendar to have both available with one click when you are making appointments. Choose the video tool with which are most comfortable such as [Zoom](#) or [Google Meet](#).

Video Mentoring also allows you to share tools and links with the Client and provide explanations when appropriate, as well as connect with clients across the country.

The NPS scores for video mentoring have been consistently higher than other meeting types. More and more clients are receptive to video.

- Before the Meeting

- Configure your Google calendar to have both available enabling you to select one when you are making appointments.
- Send a meeting invitation link to client(s) and co-mentor(s), noting the video platform being used.
- Include the video link in meeting reminders, noting the video platform being used.
- Be sure the video tool you use is available for the full time of your session (i.e. for the number of minutes you expect to be talking, with the number of people that will be in the session).

Video tip: move the video frame to right underneath your camera so you can look at both your client and your camera at the same time for a face-to-face meeting.

Be aware that some clients may have their video app set so that they see you or whomever is speaking as a full-screen image on their device.

Take care with your eye contact, facial expressions, and body language.

Smiles go a long way.

- During the Meeting

- Connect to the video call 10 minutes before the meeting start time to ensure an on-time start.
- Be sure you and the client are in locations where you can hear each other
- Speak clearly and talk directly into the microphone.
- Avoid background visual and noise distractions (rustling papers, typing on keyboard, etc.).
- Avoid speaking over one another during the session, mute your microphone when not speaking for a duration.
- Maintain eye contact and use listening skills.

- o Be aware of your body language throughout the session
- o Let the client know if you are looking aside to take notes or view another screen.

3. Phone Mentoring

While this method also minimizes travel time, you do not have the visual clues that you have with an in-person or video meeting. It also is more secure for those not comfortable with video tools.

- Before the Meeting
 - o Confirm if you or the client will initiate the call. Exchange phone numbers so you each know to pick up the call when the call is made.
- During the Meeting
 - o Be sure you and the client are in locations where you can hear each other
 - o Confirm all attendees on the mentoring call.
 - o Speak in a normal volume; do not shout.
 - o Minimize external noises such as phone sounds, keyboard typing, and background noise.
 - o Be careful to note when they are finished saying something. Do not race ahead and step on what they have to say.
 - o Listening and checking in with the client is very important.
 - o Use active listening skills such as telling the client what you think you have heard and ask for verification and/or clarification.

4. Email Mentoring

Clients or Mentors may prefer email mentoring because they may not be able to travel or do not have time available to meet at the same time the other is available.

- Before the Email Response
 - o Review and understand the questions the clients are asking
 - o Use your SVO only for all client communication. Have a good signature block on your SVO. (Add link to electronic business card in Support Center)
- During the Meeting/Response

- o Respond promptly
- o Answer all of their questions
- o Thank the client and express your desire to help them
- o Be cordial and professional in your words and tone (note that words appear “harder” in print).
- o Ask questions using SLATE
- o Double check for typos and auto-completes.
- o What counts as an email mentoring session?
 - For email sessions, the content must be substantial. For example, providing useful information and/or follow up with the client on specific questions they have coming from the prior sessions

5. LiveChat Mentoring

LiveChat is on SCORE.org and on all chapter websites. LiveChat has been on score.org since January of 2021, and this program is a form of customer messaging software that enables us and our website visitors to chat in real-time. LiveChat emerged as a response to the challenges posed by the COVID-19 pandemic, and our goal was to provide our clients with seamless access to real-time mentorship. The platform ended up exceeding our expectations. Because of its success, we decided to keep developing and expanding the platform so that we can assist even more entrepreneurs throughout their small business journey.

This feature resides on SCORE.org and all chapter websites in the lower right hand corner of your screen. Below is a screenshot of what LiveChat currently looks like on the website. This is a blue, round button with a chat icon and a pop-up message that says “Need help? Chat with us!”

This client mentoring service differs significantly from a typical session due to the limited time and transactional nature of these interactions. The guidelines and instructions are available in *A Guide for SCORE LiveChat Agents* at this [LINK](#).

- o [K. Appointments with Clients \(Avoiding and Addressing No-Shows\)](#)

It is a good practice to ask the clients about their availability and talk with them about how to mesh that with yours. Then follow through by setting up an appointment using the Google calendar feature of your SCORE Google account.

Send pre-meeting reminders to clients to improve the probability that they will show up for your appointment. Reminders a day or so before and the day of your session are helpful. There are

different ways to use your SVO Google calendar appointment and email to help with this. Instructions on the best ways to use your Google Calendar and to send reminders can be found on the support center at this [LINK](#)

Some clients do not show up for an appointment. Life happens, people forget or change their minds.

If they do not show, you can use the same reminder email or text message to follow up. You might say something to the effect that you are sorry they missed your appointment. You hope they are OK and, if appropriate, ask them if they want to reschedule. If they do not respond to that message, ask them if they have changed their mind. It is a good idea to add a Note to the record (NOT a session).

As frustrating as having no-shows or being ghosted by the client might be, stay professional in your communications and outreach. Understanding and patience go a long way.

Update the status of the request in Engage as appropriate once it is clear what is happening - instruction [LINK](#).

VI. Quality of Our Mentoring Service

This section supplements the online training module *007 Measuring Success* which can be accessed from the SCORE Volunteer Training Site.

As SCORE mentors we help our clients make better business decisions that can influence the financial and personal well-being of their families for generations. It doesn't get much more important than that.

- A financially successful business can support a better and healthier lifestyle, send children to a better school, and far more
- Avoiding financial ruin from investing in a business idea with too much risk can save a family from failure
- Minimizing the stress of start-up and operation can reduce the negative impact on family and other relationships

Beyond helping people and our economy, the benefits of providing our exceptional SCORE mentoring include the following.

- Your satisfaction from making a positive difference in the world as a mentor
- Self-development and growth from learning through mentoring
- Personal relationship development in SCORE and the community

- Sustaining and supporting our SCORE organization and reputation
- Happy clients referring more people to SCORE

How do we measure the quality of our mentoring service?

1. Immediate assessment:

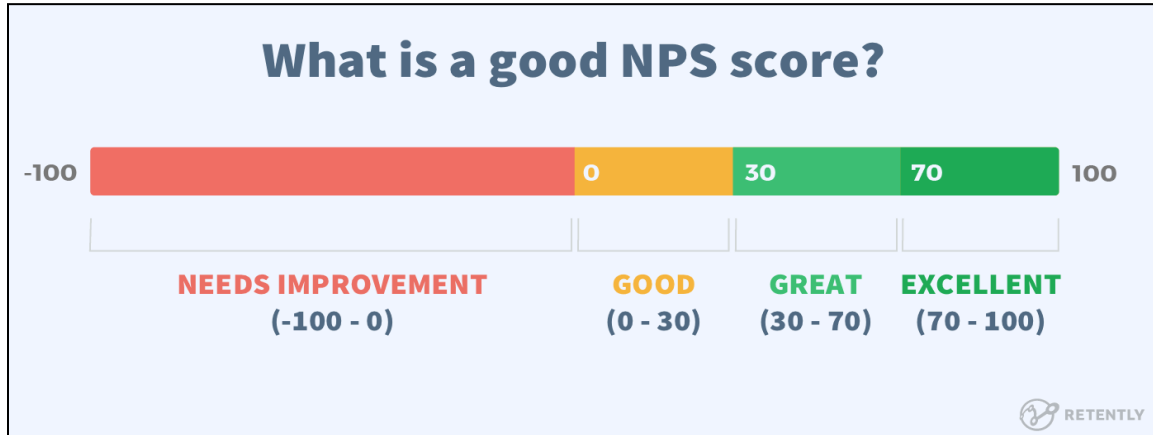
- During a mentoring session ask the client. Is this helpful? In what way is this helpful to you? Are we on track to where you want to go?
- The client's response to your request to schedule the next meeting may be an indicator of the quality of the completed session
- Close your mentoring sessions with similar questions to be sure that your guidance is meeting their needs.

2. NPS assessment is emailed to the client automatically after the first and fourth sessions are recorded in Engage. Here is a link to [NPS FAQ](#). This survey asks several questions:

- On a scale of 1 to 10, how likely is it that you would recommend SCORE services to your friends and colleagues?
- Open ended Q: What is the primary reason for the score you just gave us?
- On a scale of 1 to 5:
 - My mentor listened and understood my needs
 - Did SCORE help you?
 - My mentor recommended additional SCORE services or scheduled a follow up meeting for me
 - I will return to see this mentor again
 - i. Open Ended: Why did you answer this way?
 - I will use SCORE again in the next 3 months
- Open ended Q: What improvements could SCORE make to offer better service?

SCORE has had an NPS rating of about 90 for many years. What is a good NPS score? One benchmarking company says that a score between 0 and 30 is okay. Over 30 indicates more happy customers than unhappy ones. An NPS over 70 means that your customers love you and there are many positive word-of-mouth referrals. The consulting industry as a whole had

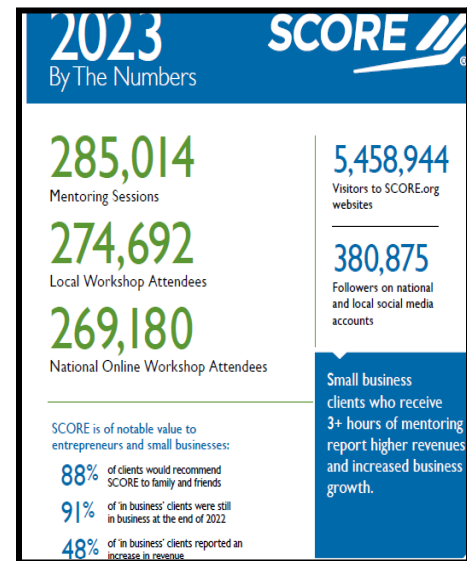
an average NPS of 67 in 2023.



- Client Engagement Survey:** Each fiscal year we survey the clients who have consumed SCORE services including mentoring and workshops. This confidential survey provides statistically significant data that we use to measure both the quality and the impact of our services.

“Did SCORE help you?” is one of the most important questions for us as a service organization. It obviously matters to our clients. All of our other stakeholders including our elected representatives in the Federal Government who determine our budget allocation care greatly about the answer to this question.

The data from the Client Engagement Surveys are used to create Client Impact Report Handouts for each district, state, region, as well as an overall national report handout. These reports for each fiscal year show the numbers of businesses and jobs that we helped to create. They also give client demographics, their stages in the business cycle, and the positive return on investment made by the Federal Government in SCORE. The figure is a page from the 2023 national impact sheet..



- Success Stories:** As of this writing <https://www.score.org/success-stories> has more than 1,600 stories from clients and mentors about the successes they have achieved through SCORE support.

This is a fantastic opportunity to showcase what your clients have achieved and to gain some personal recognition for your mentoring support.

Self-Assessment/Reflection: What do you want your clients to say about you and SCORE? What can you say and do in your mentoring sessions to make a positive difference in how they feel about us?

VII. Summary

This handbook talks a lot about the process. Ultimately it comes down to how your clients feel during and after a mentoring session with you.

The SLATE model and SCORE mentoring best practices give you a behavioral framework within which to help clients with your experience, expertise, professionalism, and empathetic connection.

Experience is a great teacher. Seasoned mentors often say that they learn from every client and from every session.

Thank you for all that you do for SCORE and American small business. You have the opportunity to make a positive difference in the lives of many individuals and our nation by being a SCORE mentor.

Self-Assessment/Reflection: In what ways can you improve your mentoring skills? As a new provisional or an experienced mentor, what would you add to these best practices?

VIII. Other Resources

A. SLATE In Action Mentoring Observation Discussion Guide

Link to help center page²

Link to Box for PDF version³

B. Glossary of SCORE Terms

Terminology is important for effective communication and understanding. Here is a [LINK](#) to the SCORE Glossary. The purpose of the SCORE Engage Glossary of Terms is to provide definitions for terms within Engage.

² help.score.org/hc/en-us/articles/360056102074-Mentoring-With-Clients-SLATE-in-Action-Observation-Discussion-Guide

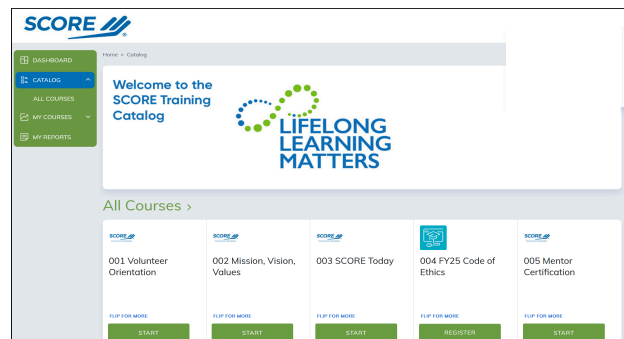
³ <https://score.app.box.com/s/bmr3blszhmr9ns6316bkioen0d8f9r4r>

➤ C. Volunteer Support Center

SCORE's internal site where volunteers can access tools, templates, upcoming events, policies and procedures. [Support Center](#)

➤ D. Volunteer Training Site

This is where you can access our extensive catalog of required and optional volunteer development training modules. You can access it through the **Volunteer Training** link near the top right corner of the landing page on Engage when you sign in.



Conclusion

In conclusion, this handbook serves as your comprehensive guide to SCORE mentoring, equipping you with the processes and tools to support our clients effectively. This resource is to be used as a reference guide to get you the information you need when you need it. By following SCORE's mentoring methodology based on SLATE and the best practices set forth in this handbook, you will help clients make informed decisions that can have lasting impacts on their businesses and communities.

Your role as a SCORE Mentor is vital. You are part of a larger mission to foster business success throughout the country. Thank you for your commitment to SLATE and the best practices set forth in this handbook.

Sources Referenced

Mentor Certification Guide

<https://score.app.box.com/s/hkebwbyralhr826ag8tkajjt886skce6>

SCORE Brand and Style Guide

<https://score.app.box.com/s/c75z4vwa75iwsy3bzbz7rh9hz780lnkex>

Mentoring Definition

<https://help.score.org/hc/en-us/articles/4690117725075-Mentoring-Definition>

SLATE in Action Observation Discussion Guide

<https://help.score.org/hc/en-us/articles/360056102074-Mentoring-With-Clients-SLATE-in-Action-Observation-Discussion-Guide>

SLATE in Action Observation Discussion Guide PDF

<https://score.app.box.com/s/bmr3blszhmr9ns6316bkioen0d8f9r4r>

Mentoring Best Practices

<https://help.score.org/hc/en-us/articles/4476013233427-Mentoring-Best-Practices>

Guide to Introductory Mentoring Sessions

<https://help.score.org/hc/en-us/articles/20729788178963-Guide-to-Introductory-Mentoring-Sessions>

Pilot Mentor Toolkit

<https://help.score.org/hc/en-us/articles/20708628736787-Pilot-Mentor-Toolkit>

Orientation to Co-Mentoring Including with Provisionals

<https://score.app.box.com/s/hk1bspwm2awqb5imqkxpvom4syf9c2te>

Client Intake & Mentor Matching Process

<https://help.score.org/hc/en-us/articles/23981257106579-Client-Intake-Mentor-Matching-Process>

Mentoring Best Practices - examples from Maryland district and Houston chapter

<https://help.score.org/hc/en-us/articles/4476013233427-Mentoring-Best-Practices>

Module 005 Mentor Certification Course

<https://score.interactyx.com/Pages/Catalog/Catalog.aspx>

Quality & NPS

<https://help.score.org/hc/en-us/articles/360037179633-Net-Promoter-SCORE-FAQs>

https://en.wikipedia.org/wiki/Net_promoter_score

<https://www.retently.com/blog/good-net-promoter-score/>

<https://help.score.org/hc/en-us/articles/360048975373-Client-Engagement-Survey-Results>

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The task force collaborated in gathering all existing mentoring guidance throughout SCORE's many systems and sites, updated content and filled in gaps where needed to create this single one-stop resource for our Mentors. Thank you to the following volunteers and staff.

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