



CARDINAL HEALTH INC. CASE STUDY

Technical Mentoring

Susan Moss

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Cardinal Health Inc.

Headquartered in Dublin, Ohio, Cardinal Health Inc. is a \$103 billion (USD) health care services company that improves the cost-effectiveness of health care. Cardinal Health helps pharmacies, hospitals, ambulatory surgery centers, clinical laboratories, and physician offices focus on patient care while reducing costs, enhancing efficiency, and improving quality. Cardinal Health is an essential link in the health care supply chain, providing pharmaceuticals and medical products and services to more than 100,000 locations each day and is also the industry-leading direct-to-home medical supplies distributor. The company is a leading manufacturer of medical and surgical products, including gloves, surgical apparel, and fluid management products. In addition, the company operates the nation's largest network of radiopharmacies that dispense products to aid in the early diagnosis and treatment of disease. Ranked No. 26 on the Fortune 500, Cardinal Health employs more than 36,000 people worldwide.

PROGRAM OVERVIEW AND DESIGN

Cardinal Health uses mentoring as one element of its global talent management strategy to offer meaningful experiences, coaching, and tools so that employees can build great careers. "We have a multiple-prong approach to ensure our employees have the capability and the capacity to deliver on business objectives to meet our strategic needs," said Susan Moss, program manager for Cardinal Health's enterprise-wide mentoring program. "Although it is not intended to be a standalone program, mentoring is a critical component of our development portfolio."

In addition to informal mentoring that takes place within and across teams, Cardinal Health has had an enterprise-wide formal mentoring initiative in place since 2011 (it was reimaged and improved early in 2015). The initiative encompasses nine formal mentoring programs, some enterprise-wide and some limited to specific business segments and functions. Goals

vary by program, with some focused on employees facing specific challenges or career milestones and others enabling more open-ended learning and development. With the exception of a peer mentoring program for new leaders (described below), all the programs leverage one-on-one mentoring relationships.

The most expansive of Cardinal Health's mentoring programs is its open mentoring initiative, which is open to any employee wishing to reach out across fields, regions, or functional areas to support their individual development goals or gain a better grasp of the firm's operations. This program, which is the main focus of this case study, enables employees to learn almost anything they believe would help them on the job, from specific knowledge and skills to more general strategies for career management and personal effectiveness.

Other mentoring programs are tied to business initiatives, such as leadership development or embracing diversity.

People use mentoring as a way to connect with other people to learn how to make their next move, what they need to do, what they need to know, how to get there, and how to be better in their job. Mentors provide advice and counseling and act as a sounding board.

—Susan Moss, program manager

For example, Cardinal Health has leadership development programs for high-potential employees at the vice president, director, manager, and new professional (i.e., recent college graduate) levels. A group peer-mentoring program enables participants in these four leadership development programs to cross-pollinate. Through 35 peer groups of five participants each, new leaders are exposed to colleagues at various levels of the organization and encouraged to exchange ideas on applying leadership techniques to their own day-to-day jobs.

The organization also has mentoring programs to support minority and female talent pipelines. For example, in addition to a women's initiative network, Cardinal Health has a mentoring program focused on supporting female employees in the sales function.

Some functions and business segments have their own formal mentoring programs to help participants build technical expertise and learn about career opportunities. For example, the pharmaceutical business segment developed a dedicated mentor program in response to results from an engagement survey in which employees explicitly requested opportunities for peer-to-peer interaction and learning. The program reaches across various functions in the pharmaceutical business segment to help participants learn more about the operations of the business and the career paths within it.

Of Cardinal Health's nine mentoring programs, five are led by their own program managers who are either HR representatives or line leaders from the sponsoring initiatives, business segments, or functions. The remaining four programs are monitored at the corporate level through the enterprise-wide mentoring program within the HR function. The decision as to whether a program will be led by its own program manager is up to the stakeholders: With guidance from corporate HR, specific groups within Cardinal Health may decide how they want to set up and manage their programs. However, all the programs leverage a common software platform, MentorcliQ, and the enterprise-wide mentoring program manager oversees and supports all programs at a high level.

SELECTING AND PAIRING PARTICIPANTS

Cardinal Health's mentoring programs are open to any employee, regardless of rank or location, as long as the individual meets certain minimum requirements. For the open mentoring initiative, employees may participate as mentees after six months of employment and as mentors after one year and acceptable performance ratings. Mentoring programs such as those for new leaders have additional steps and participation requirements.

Before engaging, participants in all programs must make an explicit commitment to complete the program cycle, attend training, and gain approval from their immediate supervisors. "You don't always do your mentoring on your lunch period," Moss said, "so it's important to set clear expectations and ensure mentoring obligations are balanced with the rest of an individual's workload."

Defining Mentee Needs and Preferences

In terms of pairing mentors and mentees, Cardinal Health has improved its process based on feedback and lessons learned. Previously, the mentoring programs aimed to match mentors and mentees on more

than 20 specific competencies, but this was ultimately deemed too complicated. Employees had trouble articulating what competencies they needed or what they wanted out of a mentoring relationship at this level of detail.

To simplify the process, applicants now select up to three of five broad focus areas representing the knowledge and skills they want to build through their mentoring partnerships:

1. business acumen,
2. career management,
3. leadership development,
4. personal effectiveness, and
5. organizational savvy.

If someone wants to learn about a particular discipline, then he or she would select the “business acumen” focus area and would be paired with a mentor with the requisite knowledge. Other focus areas have less specific requirements and allow for a range of pairings that span functions, business segments, and job roles. Across all the mentoring programs, employees are often most interested in career management, followed by leadership development and business acumen.

Applicants’ desired focus areas are collected through an enrollment survey administered via the MentorcliQ software platform. The enrollment process also includes a two-minute Visual Personality Survey™ that gauges applicants against the Big Five factors¹—openness, conscientiousness, extraversion, agreeableness, and neuroticism—by providing sets of pictures (e.g., someone at a concert vs. at home) and asking participants to select the picture most like them. Based on the survey results and special requests (such as mentors from a specific region), an algorithm provides applicants with profiles of suitable mentors in rank order.

Pairing Mentees and Mentors

For the open mentoring initiative, applicants use the pairing algorithm to sort through potential mentors and then select their top three choices. Availability is key, with potential mentors unable to sign up and create profiles unless they can mentor immediately. “The rankings may show you a mentor with a 95 percent similarity to you. It’s up to you to decide if you want someone very similar or more different,” said Moss. “As long as I can accommodate it, I match pairs based on one of [the mentee’s] first three preferences. If not, I follow up with the individual for more preferences.” There are few rules limiting the mentee’s selections, but Moss tries to avoid pairing people who are more than two hierarchical levels apart.

Other Cardinal Health mentoring programs use more rigorous selection and pairing methodologies. For example, HR and business leaders recommend mentors for the sales leadership program. In the women’s initiative network, mentors pick who they want to mentor. In some programs such as sales, a manager determines whether a proposed match is ideal and will provide the right kind of exposure; he or she can potentially recommend someone else. For the pharmaceutical program, applicants rank their

¹ For additional information see: Srivastava, S. (2015). *Measuring the Big Five Personality Factors*. Retrieved [October 1, 2015] from <http://psdlab.uoregon.edu/bigfive.html>.

preferences, but managers review these rankings and then make the final selection for best fit. In some cases, pairings are made outside the online system, be it through line managers or the HR function; those pairings are then entered into the platform.

The pairing process tends to be similar, Moss stated, regardless of an applicant's organizational level or the nature of the applicant's job. Each mentoring program manager can decide exactly how matching will work based on the goals of the specific program. However, in all cases, mentors and mentees are told up front how the matching process will work, which helps manage participants' expectations. "We don't surprise anybody," Moss said.

MENTORING PROCESS AND ENABLERS

Across most of Cardinal Health's programs, formal mentoring relationships last six months. However, each program manager can choose the appropriate duration based on the goals and structure of his or her program. For example, the leadership development mentoring initiative usually lasts nine months to coincide with the term of the leadership development program. Mentorship in congruence with Cardinal Health's sales leadership academy may last a year, and mentoring with a sponsorship advocacy program may continue for two years.

For the open mentoring initiative, six-month relationships are initiated quarterly at set intervals following events that help applicants learn how to set objectives and identify potential mentors. Once a pair is officially matched, they collaborate on a mentoring agreement, the template (Figure 1) for which is provided by MentorcliQ.

The agreement lays out the basics of the relationship, including the start and end date, when and how the pair will meet, and who will set up the meetings. The agreement also defines learning goals for the mentee—these vary widely, but might include specific business acumen competencies or more general skills around leadership development, communication, public speaking, team building, or problem solving. The final section of the agreement allows the mentor and mentee to set further expectations and ground rules for their relationship.

"We don't ask them to share that agreement with us because that's between the mentor and mentee," Moss said, but they must put an agreement in place to clarify expectations and guide further interactions.

Program participants are expected to meet for at least one hour a month, although most pairs meet more frequently. Meetings may occur in person or over the phone, depending on the participants' locations and preferences. "Long-distance relationships can work just as well as in-person relationships if the mentee and mentor commit the time to make it work," Moss said. The specifics of the interactions vary greatly based on the areas in which the mentee wants assistance and the expectations set out in the mentoring agreement.

MentorcliQ Mentoring Partnership Agreement Used by Cardinal Health

The basics

Length of Mentoring: Start Date <input type="text"/>	Who will be responsible for setting meetings? <input type="text"/>	How often will we meet? <input type="text"/>
Mid-cycle check in <input type="text"/>	Preferred method of meeting (phone, in person, etc) <input type="text"/>	How long should our meeting times last? <input type="text"/>
End Date <input type="text"/>		

What we're working towards

SMART Goals (Specific, Measurable, Attainable, Relevant, and Trackable)

Just so we're on the same page...

Partnership Expectations Mentor: <input type="text"/> Mentee: <input type="text"/>	Ground Rules Mentor: <input type="text"/> Mentee: <input type="text"/>	Preferences outside of scheduled meetings <input type="text"/>
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Got it!

We agree to honor this agreement as outlined above and will assess our progress as outlined by the program guidelines, as well as at the conclusion of the partnership. If we decide to end the partnership prior to the scheduled conclusion, we will appropriately notify one another and the program administrator.

Mentor Signature Date

Mentee Signature Date

Figure 1

During a mentorship, participants receive a monthly QuickcliQ™ assessment that, Moss estimated, requires less than 10 seconds to complete (this is also provided by MentorcliQ). To ensure that mentorships get off the ground, the QuickcliQ checks for early milestones such as completing initial training, scheduling the first meeting, and finalizing the mentoring agreement. “We also ask them about the focus areas they worked on and how much time they spent on mentoring for the month,” she said. An optional comments section allows participants to provide qualitative feedback as needed.

A longer mid-cycle survey helps pairs to reflect on progress to date and recalibrate as needed. This survey gauges how the relationship is working, solicits recommendations, and determines if a pair needs more support. Mid-cycle training is also available.

Throughout the mentoring process, the enterprise-wide program provides support if any issues are raised in the monthly surveys. When necessary, Cardinal Health does have a process for disengaging partners. Moss said the program has not experienced any significant failures; there have been a small number of disengagements, but most relationships quickly get back on track with support and advice.

A final milestone survey gauges what the participants learned and what recommendations they have regarding mentoring support. After the initial six-month commitment, a pair may agree to continue for another six months. Then, a mentee may find a new mentor, become a mentor, or take a break.

Recognizing that a single mentor cannot meet all of a mentee’s development needs, Cardinal Health encourages participants to use mentoring to build their professional networks beyond the individuals with whom they are directly paired. Over the course of a mentoring relationship, each mentor is tasked with connecting his or her mentee to at least three other new contacts who can help support the mentee’s development. This amplifies the impact of the mentoring program and helps spur collaboration and knowledge sharing among parts of the workforce that might not otherwise interact.

Tools, Templates, and Platforms

Cardinal Health has a common platform for all of its mentoring programs supplied by a third-party vendor, MentorcliQ. This platform enables rankings, selections, pairings, milestone surveys, notifications, and documentation—the entire mentoring process. The vendor’s software also profiles employees, including the use of the Visual Personality Survey, to help applicants articulate their preferences and find likeminded mentors.

The platform includes how-to videos and training for each stage of the mentoring process, along with document templates such as the mentoring agreement. Although the videos are currently generic, Cardinal Health is working with its vendor to create company-specific options.

Engagement and Training

Because of the high demand for mentors within the various programs, Moss spends a lot of time communicating the benefits and urging candidates sign up. “Recruiting is an ongoing effort,” Moss said. “You always have to build that pipeline of mentors.” In the open mentoring initiative, the organization

intentionally avoids strict candidate qualifications in order to increase the pool of potential mentors and accommodate different needs and interests.

Moss actively recruits mentors by presenting to leadership groups, functional area groups, and employee resource groups across the organization. “There is no way I can talk to everybody,” she said, “but I try to talk to enough people that they can share the message with their respective groups.” Information about the mentoring program is available in the employee development section of the HR website and in intranet newsletters that feature top-rated mentors talking about their own mentoring experience and what they’ve gotten out of it. “I feel like a sales person, constantly promoting and encouraging people to just try it,” Moss said.

Once they are enrolled in the mentoring system, both mentors and mentees undergo video-based training that covers roles, responsibilities, and advice. Participants see how to move conversations forward, how to react to certain situations, and how to successfully learn. “They learn more about listening, asking, and understanding the question behind the question and actually even knowing what questions to ask,” said Moss.

At this point, Cardinal Health knows what elements make for a successful mentoring relationship. Mentors, Moss said, have to be trustworthy and non-judgmental. Training shows them how to truly listen objectively and then connect, support, and challenge the mentee. “I think the outcomes really depend on the caliber and the quality of the mentoring relationships,” said Moss. “A mentor must challenge you on different things, support and listen to you, help you articulate your thoughts, and connect you with others. There is not an expectation that your mentor is the subject matter expert in all things. They don't know everything about everything.” The goal is to help mentees learn how to learn, rather than relying on mentors to answer every question.

MEASURES AND ACCOUNTABILITY

To gauge the success of its mentoring programs, Cardinal Health tracks participation, activities, and value.

Participation measures look at the number of pairings as well as participant demographics (e.g., the genders, ethnicities, functional affiliations, and organizational levels of participants). Activity measures assess engagement in the programs, including time volunteered and the regularity of meetings. The online system makes it easy for program administrators to review aggregate measures, compare different groups, and monitor trends over time.

From December 2014 to August 2015, 500 pairs of mentors and mentees logged in 3,000 hours of time. Moss sees the number of hours dedicated to mentoring as a particularly important measure. “It’s powerful to look at the commitment our employees are making, not only to each other but to their development,” she said. She also compares the hours mentees spend learning from volunteer mentors to the cost of comparable development options—such as classroom training and executive coaching—to estimate the return on investment generated by the mentoring program.

To gauge value, the enterprise-wide mentoring program tracks satisfaction levels at the mid-cycle and end-of-term surveys, along with reported achievements and progress. In the program's milestone surveys, participants provide examples of mentoring activities in the open comments section. Moss compiles these activities (e.g., touring a different site or critiquing a presentation) to show the organization at-large what mentoring helps accomplish. Mentees are encouraged to thank mentors through the corporate recognition program, which also helps Cardinal Health gauge the impact of such efforts.

Moss shares results with talent management leaders, as well as with individual program managers, on a quarterly basis. Program managers also share best practices and report results at a semiannual talent council meeting, attended by the chief HR officer, CEO, and staff.

LESSONS LEARNED

Cardinal Health has made a number of tweaks to its enterprise-wide mentoring program in 2014 and 2015 in order to better meet the needs of participants. "The talent employee experience is part of our foundation on everything that we do," said Moss. "Every year, when we establish what our business strategic objectives are, mentoring is part of making these things available to our employees so that they can have a great career at Cardinal Health."

Understand what people need, and understand how they want these things to work. What does a mentoring relationship look like for them? Make it as easy as possible to do it. Don't make work harder than it has to be.

—Susan Moss, program manager

Recent changes are the results of an effort to understand what employees need and how they want things to work, Moss said.

For example, in its online mentor selection process, the organization has replaced the 20 desired competencies—that participants struggled to prioritize—with its simpler five focus areas. In another example, the organization changed an open enrollment process to a quarterly schedule in order to ensure mentors' commitment for a specific time period. "By having quarterly enrollment and knowing that the people who sign up for that quarter are committed, we have greater engagement, greater participation, and greater satisfaction on the mentee's and the mentor's parts," said Moss. "We make sure that participants first socialize and understand the needs of the organization and their other participants."

Moss said she uses every open channel to reach out to potential mentors, as well as potential partners. She said: "By design I have not only solicited different people to have their own programs but also built an infrastructure that is flexible enough to allow and encourage other parts of the organization to create initiatives. We would not have had the numbers that we have in the program right now if I was just trying to do it by myself."

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