

Choosing When to Advise, Coach, or Mentor

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The Challenge

Faculty members are expected to guide learners across a broad spectrum of topics, ranging from performance milestones and scholarship to career development and well-being. While a learner may be looking for a quick piece of advice, faculty may see a need for ongoing performance improvement. Alternatively, the learner may want mentoring, while the faculty member plans to offer a single bit of advice. Misaligned expectations can be frustrating for faculty (when a trainee does not appear to listen or act on the guidance offered) and for a trainee, who fails to obtain the desired input. For successful guidance to occur, learner and faculty expectations must be made explicit, and the approaches and time commitments must match the aims of the session.

What Is Known

Faculty and trainees lack common, clear terminology surrounding various forms of guidance. Many learners are assigned, or select, advisors and mentors. The recent introduction of “coaching” to the mix has often been done without clarifying similarities, differences, and potential overlap of these roles.

Advising, coaching, and mentoring are 3 distinct approaches to providing guidance. Coaching with wisdom combines elements of coaching and mentoring.

Each approach has a specific purpose, requires different (but overlapping) expertise, and uses different strategies. Explicit consideration of the 3 approaches and their features can facilitate tailoring these sessions and aligning expectations and plans to goals.

An advisor offers strategies about a specific event, which the learner may or may not follow. Mentoring implies a long-term relationship in which experiential wisdom is offered to help build the many aspects of a learner’s career. Explicitly stating that your role is to “coach” means that you will help the learner identify a goal and develop solutions through nondirective questions. This process results in the learner identifying strategies that he or she can comfortably employ, increasing the likelihood of follow-through.

How You Can Start TODAY

Understand the continuum of guidance and differentiate advising from coaching from mentoring.

The TABLE is a synopsis of the literature based on work that sought to clarify these definitions. Learning about

Rip Out Action Items

Program directors should:

1. Begin each guidance interaction by discussing the learner’s session goals, then select a guidance method.
2. Review your program’s documents. Are the guidance methods appropriate?
3. Provide deliberate practice opportunities, such as role-plays, to gain skills in aligning the strategy with interaction goals.

each strategy will help you clarify nuances and allow you to use relevant skills.

Explicitly ask the learner what guidance he or she is seeking, align your approach, and explain what you will be providing. Learners do not always know what they want (or need). Clarifying short- and long-term goals can help you select the right strategy and better meet expectations. Once a strategy is selected, discuss with the learner what will and what will not be covered in your interactions.

Enjoy the interaction. Watching the “light bulb go on,” seeing progress being made and careers developing, is why many are involved in medical education.

Be cautious about switching roles during an interaction. In coaching, the learner develops an individualized plan through questioning. When you have expertise in the area, it is easy to switch into the mentor role. Some call that “coaching with wisdom.” Be very clear that you have switched roles by saying, for example, “I am mentoring you now.” Then switch back to coaching when appropriate.

Close each interaction by soliciting feedback to help you improve your use of all strategies. Reflect on how well you stayed in the role, and ask the learner directly. Feedback on the usefulness of your technique allows for deliberate practice of the various guidance strategies and helps you improve in carrying out this role.

What You Can Do LONG TERM

Review your program’s use of the terms *advising*, *coaching*, and *mentoring*. Share the definitions with colleagues. Make sure that all advisors, mentors, and coaches clarify terms, especially when talking with learners.

Seek out opportunities to deliberately practice different skills with different levels of learners in different settings and with different topics/focus. When asked for your input, think about what strategy to use. Select words that differentiate advising versus coaching versus mentoring

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TABLE
Comparing and Contrasting 4 Forms of Guidance

Item	Advisor	Coach	Coach With Wisdom	Mentor
Focus	Specific event	Task/skill	Task/skill with long-term view in the field	Career; focus on character development, socialization into field
Expert	In target area	Global/not specific	In specific performance target	In same field, “been there” and shares
Control	Advisor directed	Learner directed	Mostly learner directed	Mentor directed with repeated interchanges
Strategy	Give advice or answer	Help learner find a strategy through asking clarifying questions	Combines coaching and mentoring on specific topic; when mentor, explicitly states he/she is doing so	After discussion with learner, mentor transmits information intentionally based on his/her own experience and expertise; networks learner with others in field
Benefits	None for advisor	No direct benefit for coach	No direct benefit for coach	Mutual benefit with mentor often involved in learner products
Time	Single session	Time limited, current	Time limited, current	Long-term, future oriented

(eg, advising, “You should . . .”; coaching, “What could you do?”; mentoring, “In my experience, this has worked.”).

Provide training to faculty and learners on the differences across the spectrum of guidance. Define key features of each method and practice explicitly defining roles during role-plays. Encourage those who are frequently sought out by learners to share techniques that work and those that do not. Take advantage of opportunities to practice with feedback in a low-stakes environment.

Resources

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