CPA ONTARIO



Career Mentorship Program: Mentee Guide

Welcome to the Career Mentorship Program

This experience is designed to support your professional growth, decision-making and confidence through meaningful conversations with experienced CPAs and peers navigating similar career journeys.

Understanding Group Mentorship

Group mentorship brings together one mentor and a small group of mentees to learn collaboratively.

This format:

- Encourages peer-to-peer learning
- Provides diverse perspectives
- Builds a sense of community
- Creates more dynamic, discussion-based learning

What makes this experience unique:

- **Practical** – grounded in real-world challenges
- **Interactive** – driven by discussion, not presentations
- **Personalized** – shaped by your goals and questions
- **Collaborative** – enriched by peer perspectives



Program Overview

- Your group will meet once per month to a maximum of four times.
- Session dates will be distributed one month prior to the start of the program.
- The program will run on Zoom and you will receive a unique link for your group sessions.
- Sessions will run for 90 minutes between 11:30 a.m. to 1 p.m. EST



Program Schedule

Session	Notes
Session 1	Program kickoff
Session 2	Regular session
Session 3	Regular session
Session 4	Final session & wrap-up

We encourage you to attend all sessions, as each one builds on the last.

How the Experience Works

Each session builds on the last, helping you:

- Clarify your goals
- Explore challenges and ideas
- Learn from others' experiences
- Apply insights to your own situation



What to Expect in Each Session

Sessions are discussion-based and highly interactive.

You can expect:

- Short, practical insights from mentors
- Conversations based on real mentee questions
- Problem-solving discussions grounded in real scenarios
- Peer exchange and idea-sharing

You'll leave with:

- Practical insights you can apply right away
- New perspectives on your challenges
- At least one clear action or next step

Key Topic Areas

Your group will focus on one of the following:

- Starting Your Practice
- Scaling Your Practice
- Succession Planning & Retirement
- Practice Management
- AI and the Firm of the Future

Discussions will be tailored to the specific needs of your group.

How Sessions Build Over Time

What This Program Is (and Is Not)

This is:

- A space for discussion and shared learning
- A chance to explore real challenges
- A way to gain practical insights and perspectives

This is not:

- A technical training session or lecture
- One-on-one coaching
- A presentation-based environment

Participation Expectations

To create a valuable experience for everyone, we ask that you:

- Attend all sessions where possible
- Come prepared with a question or challenge
- Keep your camera on (where possible)
- Actively contribute to discussions

Group Norms

To support a safe and productive environment:

- Confidentiality – What's shared stays within the group
- Respect – All perspectives are welcome
- No judgment – This is a learning space
- Equal participation – Be mindful of sharing airtime

Before Each Session

Allow 10 - 15 minutes for preparation

1 Set a Clear Goal

Ask yourself:

"What do I want to get out of this session?"

Examples:

- "I want help pricing my services"
- "I need ideas to grow my client base"
- "I'm unsure about my next career step"



2 Bring a Real Challenge

Come ready to discuss:

- A current issue you're facing
- A decision you're trying to make
- Something that isn't working

The more specific you are, the more valuable the discussion will be.

3 Prepare 1–2 Questions

Examples:

- "How do I know when it's time to scale?"
- "What's a common mistake to avoid?"
- "How would you approach this situation?"

4 Submit Questions (if requested)

- Keep them concise
- Focus on real situations
- Prioritize what matters most

Making the Most of the Experience

Before the Session

- Review the "Before Each Session" guide provided

During the Session

- Take notes
- Participate in discussion
- Ask follow-up questions

After the Session

- Identify 1–2 key takeaways
- Choose one action to apply
- Reflect on what you'll do differently

Between Sessions

- Apply one idea from the previous session to a real-world situation
- Reflect on what worked (or didn't)
- Prepare updates or follow-up questions for the next session

Common Pitfalls to Avoid

- Arriving to the session without a clear goal or question
- Attending as a silent observer
- Expecting mentors to provide all the answers

Final Thought

This experience works best when you show up prepared, open and willing to contribute.

Quick Reflection Worksheet

1. My goal for this session:

2. A challenge I'm facing:

3. One question I want answered:

4. One action I will take after the session:

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