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HCD 691 Research

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**Executive Summary: Central Investigations Mentorship Program**

The Central Investigations Mentorship Program is a strategic initiative meant to support the personal/professional development, performance and retention of investigators with the Central Investigations Team. The program seeks to facilitate structured, meaningful mentorship relationships between both experienced and developing investigators, investigations managers and interim investigators. Through personalized pairing and varying mentorship paths, the program will serve as an important tool in creating a more knowledgeable, engaged, and more tenured investigations team.

As the organization continues to open new sites and adding additional headcount, cases will undoubtedly increase, as will the complexity of the investigations. Because of this, the need for quality mentorship relationships and professional support has never been more important. This Central Investigations Mentorship Program was developed in response to ever changing needs of the business and will provide a learning framework which prioritizes specialized learning, skill building, and an increase of the sharing of institutional knowledge. This initiative also supports broader goals as it relates to engagement and succession planning. This initiative which aligns with Central Investigations’ pilar of continuous learning.

**Project Definition Document**

The Central Investigations Mentorship Program project began with a goal of developing new and existing investigators in a departure from the existing organizational mentorship program. It was determined that, to create a synergistic environment of shared knowledge amongst tenured and new investigators, a departmental specific program should be installed to create a structured mentorship process which would only include members of the Central Investigations team. This program provides a formalized way to pair investigators with other investigators who can mentor them by providing them guidance with professional growth, understanding of standard work, and ways to increase proficiency. This program is intended to be a “structured and purposeful relationship between an experienced professional (mentor) and a less-experienced individual (mentee)” (Malicay 2023) which will provide a mutually beneficial experience for both parties.

The Central Investigations department encompasses approximately four members of the senior leadership team, twelve Employee Relations (ER) Investigations Managers (dependent upon business line), approximately 35 Sr. ER Investigators (L6) and approximately 250 ER Investigators (L5). The implementation of the mentorship program was supported by members of the senior leadership team, ER managers, and organizational stakeholders. Key deliverables include a developmental pairing matrix, participation amongst the team, and overall satisfaction amongst participants.

**Client Organization, Project Sponsor, and Alignment Group**

The Central Investigations department falls within the HR overall organization but is solely responsible for conducting investigations into escalations reported by managers and associates. As previously mentioned, the organization has approximately 300 members which encompasses the senior leadership team (SLT), Sr. ER Investigators and other ER investigators. With regard to the mentorship program, the communication will flow from team members of the project group to the project manager and the project manager will present the information to the SLT. The SLT will then approve of any of the proposals or make recommendations for changes within the mentorship program.

When the concept of the mentorship program was presented to the SLT, it was unanimously approved, but the infrastructure had to be built. I was assigned as the team leader for this initiative, but a team needed to be built. Each team member would be assigned different tasks to move the initiative forward. A bi-weekly meeting would be held, and each team member would be responsible for updating the team with the progress of their assignment. Although a cadence of bi-weekly meetings was established, if any team member needed assistance or guidance outside of those meetings, we would hold ad hoc meetings. If there was something that I could not assist them with, I would escalate the issue with the SLT and request additional assistance.

**Project Sponsor:**

*Cathy Hanna-*ER Manager

**Project Manager:**

*Travis Schreier-*Sr. ER Investigator

**Project Team Members:**

*Toni Ann Latu-*Sr. ER Investigator (Delivery Stations)

*Michael Bailey-*ER Investigator (Delivery Stations)

*Shama Kaczmeric-*Sr. ER Investigator (Executive Escalations)

*Cammie McIver*-ER Investigator (Amazon Air)

*Joey McBee*-Sr. ER Investigator (Executive Escalations)

**Problem Statement**

Amazon currently has a mentorship program that allows all leaders within the organization to participate in. In its current form, the company’s mentorship program is designed to broadly include cross-functional mentorship opportunities which is intended to encourage individual growth and development for the participants. Although the current program allows for the perspective of a multitude of leaders and fosters networking amongst Amazon leaders, it lacks specificity as it relates to the Central Investigations department and the development of the department’s team members. While this inclusive model offered value in fostering general networking and exposure to different perspectives, it did not adequately address the development needs of Central Investigations investigators. Additionally, the mentor/mentee pairings were determined either based on a manual connection or an algorithm that does not consider the vast differences in work experiences of the mentors/mentees or the professional goals of mentors. This broad development strategy led to misaligned expectations and results from cross-functional mentor/mentee pairings. Specifically, members of the Central Investigations team are not getting the professional development that is required to grow specifically within the investigations department. Without a development program that is specific to Central Investigations, it has led to missed opportunities to develop specialized skill sets amongst investigators, develop their current strengths and improve their current investigative deficiencies. Communication typically flows through team meetings and 1:1 discussions, with performance expectations delivered through annual reviews and manager feedback. However, the department lacked a formal framework for peer development, skill progression, and mentorship—especially for those transitioning into investigations or seeking growth in specialized casework. The mentorship program was initiated to bridge this gap, increase consistency in development practices, and promote retention through career support.

Employees within Central Investigations previously had limited access to structured development opportunities which are specific to their roles within Amazon. This can lead to inconsistent messaging for mentors/mentees, lack of career progression guidance specific to their current role, and lower employee engagement. This broad mentoring strategy also poses a risk to the ability for ER Investigators to promote as “past research suggests that employees who receive mentoring are more prone to rapid advancement or promotions” (Ivey & Dupre 2020). The absence of a formal mentorship framework within the Central Investigations department reduces knowledge transfer and slows the development of both new investigators and investigators that are trying to develop in their current role.

**Project Goal**

The goal of the Central Investigations Mentorship Program project is to establish a sustainable and structured mentorship framework for investigators that will support their professional growth and encourage the development of investigators across all departments of the Central Investigations team. The mentorship program is designed to create a culture of collaboration, shared knowledge, and learning. This will be accomplished by pairing experienced investigators with mentees based on identified developmental needs for mentees, strengths of the mentors, strategic matching of competencies and goals for the mentee.

The ERCI mentorship initiative seeks to enhance investigative competencies, improve high judgement, reduce quality defects, and increase investigator engagement by leveraging experienced investigators to help investigators reach their full potential. By creating intentional and specific mentor/mentee relationships, the ERCI mentorship program seeks to provide a customizable mentorship program that will reduce the dependency on the current organizational mentorship program and support the continued development of investigators which will establish a pipeline for future talent and facilitate investigator growth.

The mentorship program is aligned with the department’s long-term vision of strengthening organizational effectiveness and risk management through improved investigator readiness. It will serve as both a professional development tool and a succession planning mechanism, ensuring that high-potential investigators are identified, supported, and retained through meaningful career growth opportunities.

**Project Objectives**

To develop a department-specific mentorship program, we have identified several objectives that the project team will need to complete. This project was initiated by the identification of the lack of a specialized mentorship program for the ERCI department and the lack of participation of investigators in the organizational mentorship program. Although institutional knowledge can be attained by the mentee “the process of developing real-world experiences can take years of on-the-job training to develop” (Scruggs 2025) and the goal is to expedite this process by sharing these “real-world experiences” amongst participants. Although the objectives may be fluid as the mentorship program evolves, initially the objectives are as follows:

* *Develop a mentorship framework tailored to the department's needs*. The department has identified the lack of a departmental specific mentorship program. We seek to create a program that is only accessible to investigators. This program will not replace the organizational mentorship program, but will supplement it. The mentorship program will also focus on the developmental needs of investigators only.
* *Identify and match mentors and mentees based on strengths, developmental opportunities, interests, goals, current performance and tenure. This will create a personalized matching process*. Each participant will initially complete a self-assessment which will require them to assess their leadership strengths/opportunities. This information should be attained by supervisor feedback, Forte reviews, and self-reflection. Mentees will also determine their desired goals of their participation in the mentorship program. The mentee will determine the length of the mentorship relationship. They will determine if they would prefer a long-term mentorship relationship versus a short-term mentorship and can also request a “flash” mentorship with the goal of preparing them for interviews or projects.
* *Provide resources for mentors and mentees.* The department currently has a “knowledge hub” in place which houses numerous resources for standard work, frequently used templates, and FAQ’s. The mentorship program will upload documents which will provide resources for mentors/mentees such as mentorship meeting guides and mentor/mentee expectations. The mentorship site will also allow for both mentors/mentees to document their meetings and add any pertinent notes.
* *Monitor participation rates with an expectation of 85% participation rates*. The administrators will regularly monitor team participation by pulling participation reports on a monthly basis. This report will assess ongoing mentor/mentee relationships, identify mentors/mentees that have not been paired up and will allow the administrators to manually pair mentors/mentees.
* *Adjust program based on feedback received*. At times, a mentor and/or mentee may request a change to their assigned mentor/mentee. The program will allow the mentor/mentee to terminate the relationship and request a new pairing. Additionally, if the committee receives feedback from participants that identify an opportunity within the program, the administrators will determine if fundamental changes to the program are needed.
* *Continued SLT involvement*. This program is intended to be led by the participants, however, the leadership team sponsors will be expected to provide guidance, assist in the resolution of systematic challenges, and encourage participation. The committee will rely on the continued support of the SLT to disseminate information and to encourage participation in the ERCI mentorship program.

As previously stated, these are the initial objectives as the ERCI mentorship program is implemented, but these objectives will remain fluid. We have built this program to allow versatility and allow for changes in the objectives as the business needs and the needs of the participants continues to evolve. The committee will regularly solicit feedback from the SLT and participants and will adjust the objectives of the ERCI mentorship program accordingly.

**Project Scope**

The Central Investigations team currently utilizes the organizational mentorship program, which restricts the involvement of Sr. Investigators to serve as a primary mentor for their peers. This program will roll out to the entire Central Investigations team and will require the participation of the entire team. The mentorship program will also rely on the support of the SLT team’s participation in both centralized communication regarding the program and the support of any changes that need to be made.

**Project Benefits**

* Improving investigative competency through meaningful mentorship relationships.
* *Enhanced Skill Development***.** Mentorship accelerates learning by providing ongoing guidance related to investigative work.
* *Retention and Engagement.* Investigators who feel developed are more likely to remain engaged in their role.
* *Creating a leadership Pipeline and encourage the transfer of institutional knowledge.* Mentorship helps establish a pipeline by sharing institutional knowledge from more tenured investigators. However, the mentor/mentee relationship will seek to be symbiotic as the mentor will also be able to exhibit their ability to mentor and develop talent which will prepare them for a people leader role.
* Providing less tenured investigators a development opportunity by providing them access to experienced investigators who will provide mentorship to guide them through complex cases.
* Provide more opportunities for experienced investigators to take on roles as active mentors.
* Increasing investigator engagement by facilitating meaningful connections, improving their support network, and a tangible investment in their development.

**Key Stakeholders**

* SLT-Sara Conti, Mark Thompson, Amanda West
* Employee Relations Investigations Managers-Cathy Hanna, Sam Robledo, Taylor Stahl

**Project Deliverables**

1. Project contract

2. Project definition document

3. Project structure

4. Departmental program roll out.

6. Provide program resources to participants

7. Ongoing program evaluation

**Assumptions, Constraints and Risks**

*Assumptions:*

* Adequate number of available qualified mentors
* Adequate number of mentees that are willing to participate
* Participants will commit to scheduled sessions
* Department leadership supports the initiative
* IT department will be able to create a department specific platform (boutique)
* The platform will be scalable to support the number of users
* SLT will consistently encourage participation

*Constraints:*

* Limited to single department which will reduce organizational visibility
* Possible budget constraints for external tools or training resources if needed
* Time availability of mentors and mentees
* Time constraints for implementation of project
* Lack of qualified mentees
* The increased number of stakeholders may risk lack of consensus with regard to the direction of the program

*Risks*

* Low participation or early dropout from mentor-mentee pairs
* Incongruent program expectations with participants
* Inadequate tracking of matching progress
* Negative feedback from participants
* Committee attrition
* Limited engagement from mentors due to workload
* Perception of favoritism or inequity in mentor selection
* Perceived nepotism regarding promotions for participants versus non-participants
* Lack of sustained long-term momentum

**Project Success Criteria**

* At least 85% participation rate amongst investigators. This will include both long and short-term participation
* At least 75% of participants report satisfaction with the program
* Project to stay within limited budget
* Minimum 90% match rate among participants
* Positive feedback from mentors on the effectiveness of the structure and support
* Program roll out set for early 2025
* Quality standards met
* Improved employment engagement scores
* Reduced attrition amongst investigators
* Long-term use (2+years)
* Becomes required part of the onboarding process
* Supplements organizational mentorship program

**Estimated Cost and Duration**

**Figure 1**

Estimation of ERCI Mentorship Program

|  |  |  |
| --- | --- | --- |
| Estimated Cost of Project | | |
| Expense Type | Description | Estimated Cost |
| Labor | Salaries of the ERCI mentorship committee. This will include the time to create the program, meetings to discuss the program and monitoring the project. Also to include the salaries of participants. | ~$200k |
| Software Creation | Creating a platform for users. One member of IT will be able to create this boutique platform. This will be an ad hoc project which should take no more than 5 hours/week. | ~$5k |
| Platform Maintenance | One hour/month or as needed to maintain platform for 2 years. | ~$10k annually |
| Platform for meetings | Platform is already established. Meetings will be held via Chime and/or Slack | $0 |
| Total Estimated Cost of Project ~$215\* | | |
| \* The noted costs are only estimated salaries | | |

**Figure 2**

Estimation of ERCI Mentorship Program Timeline

|  |  |  |
| --- | --- | --- |
| Estimated Project Duration | | |
| Milestones | Timeline | Estimated Date of Completion |
| Project Discussion | 8 weeks | 3/1/25 |
| Platform Creation | 4 weeks | 5/1/25 |
| Pilot Program | 2 weeks | 5/15/25 |
| Office Hours to Discuss Program with Participants | 2 weeks | 6/1/25 |
| Participant Sign Up | 3 weeks | 6/21/25 |
| Program Launch | 1 week | 6/28/25 |
| Program Maintenance and evaluation | Ongoing | Ongoing |

**Contract Specific Deliverables**

The Central Investigations Mentorship Program project includes a project contract, project definition document, work breakdown structure, ongoing evaluation plan, a mentor-mentee pairing matrix, individual development planning template, participant guide, and ongoing evaluation.

**Preliminary Organizational Performance Analysis**

The Central Investigations team plays a vital role in supporting Amazon’s integrity through the mitigation of high-risk employee relations investigations. Based on the sensitive nature of this work, Central Investigations must ensure that its members embody the technical and investigative skills to perform this work while exhibiting the ability to possess high judgment. Skills also required to successfully complete this work is a high level of effective communication, the ability to analyze data, perform credibility assessments and appropriately administer accountability when applicable.

Based on feedback received from numerous team members, it was determined that potential developmental deficiencies were negatively impacting overall team effectiveness and possibly morale. Onboarding processes were not standardized and were not consistent. This left new investigators with knowledge gaps which grew over time and resulted in investigators being frustrated and/or unsuccessful. Although tenured investigators within the team often served informally as sources of support and guidance, the department lacked formal structure in which these investigators could share the knowledge that they previously attained. The lack of a formalized mentorship process created gaps in knowledge transfer, limited opportunities for growth, and contributed to investigations being handled inconsistenly or improperly. These performance opportunities stunted the ability for investigators to develop and also posed a risk to the integrity of investigations.

Based on these findings, we wanted to provide investigators with an intentional and specific mentorship opportunity focused on investigator development. The gaps highlighted the need for a structured mentorship program that could provide consistent development opportunities for investigators which promoting team collaboration while sharing institutional knowledge. By implementing a mentorship framework that reflected members’ developmental goals, the Central Investigations team intends to improve investigators’ abilities, improve engagement, reduce attrition and enhance the overall performance of the team.

**Digital Project Profile**

Further explanation and graphics explaining the ERCI mentorship program can be accessed via the website <https://cjackson02.github.io/Travis-project/index.html> and will provide additional details pertaining to the program. The presentation will provide screenshots that includes some of the material that was created to support the ERCI mentorship initiative. Additionally, this website will provide further details on the creation, implementation and continued monitoring to ensure the continued success of the program.

**Lessons Learned and Conclusion**

The creation and implementation of the Central Investigations Mentorship Program has benefits that extend way beyond solely mentorship. This program can help improve organization performance, reduce the potential of litigation, increase engagement, and reduce investigator attrition. Although these assumptions are partially theoretical, with the small sample size of the results, we can conclude that both the long and short term benefits of this program will be beneficial to both new and tenured investigators. Although we have not experienced all the potential benefits to the implementation of the program, we will discuss the realized and the potential benefits of the implantation of the program below.

*Sponsorship visibility*

Obtaining the approval of the SLT was crucial in the launch of this program. This approval lent legitimacy to the program and helped to increase the visibility of the opportunities for investigators regarding mentorship. Investigators were more likely to engage in mentorship opportunities when they understood that “mentorship participation was valued at the highest levels of the department”….and that “sponsorship is one of the most influential success factors in performance improvement programs” (Phillips & Phillips 2010). Selfishly, this initiative helped me gain exposure to SLT decision making processes and shed light on what goes into creating a “white paper” for performance improvement recommendations.

*Mentorship is not for everyone*

As mentioned earlier, the initial step of becoming a mentor is to sign up and a notification will be sent to the mentors’ supervisor. The supervisor will then determine, based on a number of different factors, if the candidate should become a mentor. Although it was rare, we received feedback from supervisors that precluded the volunteer from becoming a mentor. Although the committee did not have to discuss the feedback with the volunteer, this identified a potential schism between the manager’s assessment of the potential mentor and the mentor’s self-evaluation. Additionally, we found that even mentors that seemed to be qualified to be mentors based on their tenure and performance, were not effective mentors. Mentorship requires a balance of tailoring the message to the learner to accommodate their learning style while delivering effective mentorship. Unfortunately, some mentors were unable to strike that balance and the mentor/mentee relationship was dissolved. This isn’t to say that one party was right while the other was wrong, but sometimes the relationship wasn’t a good fit for either or both parties.

*Balance Ambiguity and Structure*

When rolling out this program, we wanted to provide a structured mentorship program but also wanted to allow for some flexibility as it relates to the mentees’ learning style and the mentors’ teaching style. Most participants were able to navigate through the ambiguity, but some needed more structure. With the size of the team and the number of participants, it was not feasible for the committee to assist each pairing and the mentor/mentee would have to rely on their direct supervisor for advice in navigating that relationship.

*Transference of knowledge helps to increase investigative efficiency and quality.*

Learning transfer improves when mentorship relates specifically to the work that is being done. Mentorship pairings primarily revolved around case work and day to day operations. Feedback from participants found that these conversations were beneficial to mentees but were also beneficial to mentors. These conversations force the mentor to really evaluate their work and must explain their decision making process, which brings them out of their comfort zone. With mentorships, the real-time application of knowledge fosters a deeper retention of information for both participants (Rothwell 2015).

*If an initiative is not consistently supported by the SLT, it has an increased probability of failure*.

This initiative could have been rolled out regionally and been owned by a regional sponsor. However, the decision was made to place a larger bet and introduce the initiative network wide. In order to implement this network wide, SLT approval needed to be acquired. A singular message of support from the SLT was not going to suffice. This program needed continued support from the SLT which reiterated their support of this program and encouraged members of the ERCI team to participate. Strategic learning initiatives must be integrated into day-to day operations in order encourage “muscle memory”.

*Stay the course but be prepared to make changes*  
It was a slow and messy start. The algorithm was slow to pair participants which led to frustration with participants and the committee. The committee resisted the urge to scrap the program and start anew. We partnered with the IT representative who created the platform and made some changes to increase pairings. Additionally, when we received feedback from participants who were unhappy about their pairing, we evaluated the pairing protocol and added some additional questions to applicants which would help refine the pairing process.

*Document everything in anticipation of committee attrition*  
During this process, the committee lost and gained some members. Those who we lost did not properly document their progress with their assignments. We learned this after our first personnel loss and made sure to rectify this going forward. With proper documentation, replacing team members was easier and reduced the time that it took to get the new team member up to speed on the progress of the initiative. Bi-weekly meetings in which each member was expected to cover their responsibilities were being held, but not being documented. After our first committee member left the team, this became a point of focus and every meeting that followed, we ensured that the meetings were properly documented and notes were sent out to the team. If any details were left out, it was the responsibility of every team member to revise the notes and resend them to the team.

*People want the opportunity to share their knowledge and also want to learn*

The initial response to this initiative was fantastic and we had a overwhelming amount of investigators that wanted to participate. Aside from some mis-pairings and some inactivity notifications, the participation rate was great. For the most part, all of the investigators were appreciative of the opportunity to participate in this program and the initiative provided them with the opportunity to share their knowledge and experience. It also provided newer investigators with a perspective that may have differed from that of the person who onboarded them. It also increased work/social circles amongst participants. The program introduced investigators to one another who otherwise may not have had the opportunity to work together.

*Mentorship is an ongoing investment*

Mentoring is a critical component of both personal and professional growth and should be considered to be one of the key performance indicators of success. Although it is important for both a mentor/mentee to feel included, “mentorship is not simply a morale booster—it is a vehicle for strategic workforce development” (Allen et al., 2020). Personally, I have benefited from both being a mentor and mentoring others. This initiative provided an opportunity to be a part of one or both roles which is critical to their growth. For the most part, being a mentor doesn’t have costs associated with it, except for time spent. However, I can’t think of an investment with a higher ROI than mentorship. Mentorship has a long lasting impact on both parties and if both parties are engaged in the process, it is one of the best investments that an organization can benefit from.

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