

# BMNZ Mentoring Assistant FAQ Sheet

*Updated 1 November 2025*

## Overview

For 34 years, BMNZ has connected Mentors and Business Owners. Now, with Mentoring Assistant, we can share knowledge better than ever.

### 1. Why is BMNZ introducing this technology?

For over 34 years BMNZ has supported business owners through mentoring. This platform will help Mentors and Business Owners focus on their conversation instead of notetaking.

### 2. What is the BMNZ Mentoring Assistant?

The BMNZ Mentoring Assistant *records* and *transcribes* your mentoring sessions, then produces a clear Meeting Summary of the discussion and agreed actions. This Meeting Summary is automatically sent to the Mentor for review, before the Mentor shares it with the Business Owner. The Meeting Summary is securely stored in Mentor Hub for the Mentor's easy access. Business Insights are gathered from the meeting, anonymised, and securely stored in a Knowledge Bank.

### 3. What technology is Business Mentors New Zealand using for the *Mentoring Assistant* tool?

The BMNZ Mentoring Assistant has been built using SmartSpace, Microsoft 365 and HubSpot. This ensures data is secure in a privacy-first, compliance-aligned architecture.

### 4. Can I use my own AI recorder?

No. Mentors and Business Owners are not to use their personal AI recorders, due to privacy, and data security concerns.

### 5. What happens to the data?

- Data is stored securely by BMNZ. Mentor/Business Owner's personal AI tools are not to be accepted into the meeting.
- Recordings, stored initially in Smartspace AI are deleted after 24 hours.
- Transcripts, stored initially in BMNZ's SharePoint are deleted after 24 hours.
- Anonymised Business Insights are stored in a Knowledge Bank.
- Your data will never be used for model training by our service providers.
- BMNZ takes its data security and privacy advice for this project, from Russell McVeagh.

## 6. Will AI replace a Mentor?

No. The Mentoring Assistant supports mentoring by providing a Meeting Summary including actions. The real value still comes from the expertise and experience of a Mentor. The Knowledge Bank will strengthen our mentoring offering.

## 7. How can I opt out of using the *Mentoring Assistant*?

Mentors can opt out at any time by logging into their profile on Mentor Hub.

Mentors and Business Owners can contact BMNZ to "Opt In or Out" at [meetings@bmnz.org.nz](mailto:meetings@bmnz.org.nz) or 0800 209 209 and we will update your profile.

# Meetings

Whether you are having an online or face-to-face mentoring session, meeting scheduling process is the same

## 8. Scheduling an On-line Meeting

1. In the Book a Meeting page in Mentor Hub, Select the orange "Book a Recorded Meeting" button to schedule a meeting with the relevant Mentee. The blue "Book a Meeting" button remains available to schedule a non-recorded meeting.
2. When creating a meeting please do not use the # symbol, this will inhibit the Mentoring Assistant tool from recording.
3. Once the meeting has been set, you will receive an email with the invite, it is important that **both parties accept the invitation or the meeting won't record**. The invite can then be saved into your preferred calendar software.
4. When your meeting is due to start, access through your preferred calendar software.
5. When starting your meeting, it is best practise for the Mentor to reaffirm consent to record with their Business Owner.
6. At the end of the meeting ensure that you end the meeting (this will trigger the meeting summarisation to start).
7. Mentors will be notified by email once the Meeting Summary is ready to be reviewed.

8. To view the summary, Mentors can use the link in the email or login to Mentor Hub. Select the meeting – click the “Review/Edit” button at the bottom of the page and select the relevant meeting.
9. The Mentor can review the Meeting Summary and make any amendments, click **Send to Mentee** and then select **Complete**. The Meeting Summary will then be sent to the Business Owner.

## 9. Scheduling a Face to Face Meeting

If a Mentor and Business Owner meet in person, the **Mentor** will record the meeting via the calendar invite, on their own device (preferably a phone). Scheduling a face to face meeting follows the same process as an online meeting noting the following key points;

- The Mentor schedules the meeting using Mentor Hub to create a meeting invitation for their Business Owner.
- **It is important that both parties accept the meeting invite or the meeting wont record.**
- When the Mentor and Business Owner are ready to start the meeting, it is best practise for the Mentor to reaffirm consent to record with their Business Owner.
- The Mentor will access the meeting invitation in their calendar on their own device, preferably a phone – check the phone volume is at high. Place the device between the two parties.
- Mentor and Business Owner introduce themselves clearly so the tech can identify who they are.
- Be clear what actions are being allocated to who during the meeting.
- At the end of the meeting the Mentor ensures that they close the meeting on their device.

## 10. What if I need to change the meeting time?

If a Mentor needs to change the date of the meeting, please take the following steps:

1. Go to Mentor Hub, amend the meeting time/date as appropriate
2. Click on the Complete button to send the updated invitation to the Business Owner.
3. Please do not propose/amend the date/time in the meeting invite itself.

If the Business Owner needs to make changes to the meeting date/time, they will need to contact you directly. The Mentor will not receive any communications sent from the Business Owner via the meeting invite.

## 11. Will the meeting calendar invite work with any calendar i.e., Outlook, Google?

Yes, you will receive an email with the calendar invitation including meeting details. Once you accept the meeting invite, it will be saved in your preferred calendar software.

## 12. What will be written in the meeting calendar invite to Business Owners?

The meeting calendar invite will display the following message:

*'You are being invited to a meeting with your BMNZ Mentor. The meeting will be recorded using the BMNZ Mentoring Assistant and a summary sent to you, by your Mentor. All information will of course be kept confidential. Click to view our [Mentor](#) and [Business Owner](#) Ts & Cs and our [Privacy Policy](#) can be viewed at [www.businessmentors.org.nz](http://www.businessmentors.org.nz).*

*Please note external AI recorders are not permitted.*

*If you need to change the time/date of your meeting, please do not make any amendments within this calendar invite. Mentors, please update the meeting record in Mentor Hub. Business Owners, please correspond directly with your Mentor.'*

## 13. What happens if the Business Owner is using a different email address than the one, they signed up with?

The email used must be the one registered in HubSpot. If it isn't, please send an email to [meetings@bmnz.org.nz](mailto:meetings@bmnz.org.nz), and the BMNZ team will update HubSpot.

## 14. What happens if the Business Owner doesn't want to be recorded or have information shared?

- BMNZs Mentoring Assistant is optional for both Mentors and Business Owners
- The BMNZ application form gives Mentors and Business Owners the option to opt in or out of meetings being recorded
- Both parties need to agree for the meeting to be recorded.
- BMNZ have updated the T&Cs and Privacy Statement these have been made available to Mentors and Business Owners

## 15. Can I turn the recording off during the meeting if necessary?

Yes, the recording can be turned off during the meeting. Click on the three dots for more options, and then "stop the recording."

## 16. How will the Mentoring Assistant pick up the action points?

The Mentoring Assistant will pull together action points based on the conversation. However, best practice is to state action points and who they are assigned to during the meeting so the Mentoring Assistant can recognise them and note them down i.e., Jane's action is to do XYZ.

### 17. How can I encourage the Mentoring Assistant to flag an important action?

Yes, simply highlight the important action ie say *"Ok Mentoring Assistant – please make sure to include this in the action points."*

### 18. How does the Meeting Summary of the meeting get sent to Mentor Hub?

When you end the meeting the Meeting Summary will be automatically saved in Mentor Hub for the Mentor's review.

The Mentor will be sent an email notifying them when the Meeting Summary is available for review, usually within 15 minutes of the conclusion of the meeting.

### 19. Who can see the Meeting Summary?

- Mentors review and approve the Meeting Summary before they share with the Business Owner.
- The Meeting Summary will remain available to the Mentor via Mentor Hub. Once the Mentor has reviewed the summary and is ready to share with the Business Owner tick the box "Share with Mentee" and click the "Complete" button. A copy will be shared with the Business Owner – via their preferred email address.
- If additional attendees require the Meeting Summary the Mentor or Business Owner will need to forward it.

### 20. Can Business Owner's amend the Meeting Summary?

No, only Mentors can go into Mentor Hub and amend the Meeting Summary before sending to the Business Owner. Mentors can't upload additional documents to the Meeting Summary.

### 21. When will the Mentor get the Meeting Summary?

Mentors will receive an email notification once the meeting summary is ready to be approved in Mentor Hub. Once the Mentor approves the summary it will be sent to the Business Owner.

Generally, the Meeting Summary will come through 15 minutes after the meeting has concluded.

## 22. What happens to the audio recording?

The audio recording used to capture the transcript will be deleted 24 hours after the meeting.

## 23. How do Mentors login to Mentor Hub?

If a mentor has lost their password or are having trouble logging into Mentor Hub, please contact BMNZ on 0800 209 209. Alternatively, you can email [bmnz.org.nz](mailto:bmnz.org.nz) and we'll give you a call to assist.

## 24. How can I give feedback?

You can provide feedback to [meetings@bmnz.org.nz](mailto:meetings@bmnz.org.nz). You can also call Katrina DDI 09 523 0260 or 0800 209 209, the BMNZ team is there to support you.