

## STEP-BY-STEP GUIDE: HOW TO ACE A FIRST MENTORSHIP MEETING



Preparing for a meeting with your mentor is vital. It is good mentee etiquette to ensure your mentor has everything necessary for a successful and productive meeting.

Establishing clear communication, getting to know each other, building trust, setting defined goals, and working towards goals will help the mentor and mentee stay on track during and after meetings.

### SETTING YOUR FIRST MEETING UP FOR SUCCESS

Initiating your first meeting with your mentor / mentee is exciting! This is the first step towards a positive and successful relationship to help support you in achieving your personal and professional goals. The steps below outline responsibilities of mentors and mentees to set your first meeting up for success:

Mentees	Mentors
<b>1. Schedule the initial meeting</b> – Take responsibility for scheduling the first meeting for about 60 minutes. The main purpose of this meeting is to get acquainted and establish goals and expectations.	<b>1. Respond to the meeting request</b> – Respond to the meeting request in a timely manner.
<b>2. Clarify your needs</b> – Identify personal and professional goals for the mentoring relationship. Be realistic!	<b>2. Recognize the value of the relationship</b> – You are not expected to meet all your mentee's needs. Understand it will be up to your mentee how to integrate your guidance.
<b>3. Share professional experiences</b> – One week prior to the first meeting, send your resume to your mentor.	<b>3. Review mentee's resume</b> – Think about links between their experiences and interest and yours. It is beneficial to share your professional experiences to show the mentee your experience is aligned with what they are looking for.

## THE FIRST MEETING

Your first mentor meeting should accomplish three simple goals for both the mentor and mentee:

1. Build familiarity and rapport.
2. Set expectations for the relationship.
3. Learn from each other.



The steps below provide an order for how your first meeting should flow, and how long each task should take for the mentors and mentees. Each party has responsibilities to ensure a productive session.

Mentees	Mentors
<b>1. Introduction (15 min)</b> – Discuss your professional experiences and academic background.	<b>1. Introduction (15 min)</b> – Share your professional experiences and academic background, especially those relevant to your mentee’s experience and aspirations.
<b>2. Review goals (15 min)</b> – Share goals for professional development.	<b>2. Review goals (15 min)</b> – Reflect on which goals you are best positioned to help with and how. Let the mentee know which goals you cannot help with and point them towards alternative resources.
<b>3. Develop strategies (15 min)</b> – Discuss which goals you can work towards together, and the required first steps. Determine the focus of your next meeting.	<b>3. Develop strategies (15 min)</b> – Choose a few goals and first steps with the mentee.
<b>4. Establish meeting times (10 min)</b> – Discuss times, dates, and places for meetings. Plan to meet for 60 minutes at least once a month.	<b>4. Establish meeting times (10 min)</b> – Discuss your preferences for between-meeting contact (email, text, office visits, etc.) and your availability. Ask the mentee about their schedule (do not assume they do not have preferences and are always available).
<b>5. Wrap Up (5 min)</b> – Express appreciation! Thank your mentor for their time and effort, and recap any follow up. Prepare for your next meeting.	<b>5. Wrap Up (5 min)</b> – Review and confirm any commitments you have made to the mentee.

Follow up promptly on any commitments made to each other. Mentees are responsible for setting up subsequent meetings. At the beginning of each meeting, review progress against the mentee’s career goal.

## How to Build a Mentor-Mentee Relationship

### WHAT IS A MENTOR?

A mentor is a seasoned professional or friend who informally guides and supports a less experienced person by building trust and modeling positive behaviors to help a mentee develop professional and personal skills. Mentors typically take the time to get to know you and the challenges you are faced with.

### WHAT IS A MENTEE?

A mentee is someone who has identified a specific personal or professional goal and who believes that the guidance and help of a mentor – and being held accountable to the mentor – can help them achieve their goal.

### GUIDELINES TO BUILDING A MENTOR-MENTEE RELATIONSHIP

A mentor should be someone you admire, such as a professional peer or co-worker who displays work **ethics** and **values** you respect. The **first step** in finding a mentor is defining what you want out of your career. Finding the right mentor requires you to be clear about your **goals**, understand what a mentor is (and is not), and look for different perspectives. Establishing a relationship is crucial to the mentor-mentee relationship and requires you to create a schedule, be positive and open to **feedback**, and do your research in the qualities you want in a mentor.

Figuring out who could be your mentor may be overwhelming if you do not know how to approach the conversation but having a **plan strategy** will help you find a mentor that is aligned to your **career** goals. Before you narrow down who you want your mentor to be, it is critical you write down what your goals are and what you are looking for from the relationship.

**TRY THIS:** Share with your potential mentor specific aspects of their career that made you want to talk to them about being your mentor. For example: “I really admire your work ethic [or anything you admire] and would like your advice on my own career.”

## BENEFITS FOR THE MENTEE AND MENTOR

Mentorship positively benefits both the mentor and mentee. Organizations supporting a mentor program foster a learning culture that encompasses growth and development. Benefits for the mentor and mentee include:

Mentor	Mentee
Build a social network	Learn new communication techniques
Boost confidence	Discover new perspectives
Determine ambitions and goals	See experiences from a new perspective in alignment with the mentee
Navigate difficult situations	

## HOW TO BE A MENTOR

Mentoring is rewarding, broadens your perspective, and increases your overall satisfaction with your career. It is important to understand how to be a mentor because it is more than being supportive of a mentee's decisions. Offering honest feedback helps the mentee with important career direction based on your experiences.

A mentor should:

- Focus on career activities, while leveraging day-to-day challenges to paint a bigger picture for career growth
- Communicate ideas from the perspective of the mentee and actively listen
- Be 100% present in every meeting and discussion
- Offer constructive criticism balanced with positive feedback
- Practice empathy by sharing the good, the bad, and the ugly of your own career experiences
- Let your mentee make decisions
- Be a positive and supportive role model

**Tip: Avoid the temptation to solve the problem or challenge for the mentee – coach instead!**

## HOW TO BE A MENTEE

Being a mentee increases self-awareness, teaches you to self-reflect, and exposes you to new and different perspectives.

A mentee should:

- Initiate meetings and be responsible for meeting topics prior to the meeting
- Come to each meeting prepared with an agenda
- Take responsibility for your applied learning between meetings
- Develop trust through transparency and authenticity
- Be respectful of your mentor's time
- Set realistic expectations with your mentor
- Remember your mentor is a volunteer and has a full-time job

**Tip: When you ask someone to be your mentor, make sure they understand what your goals are and what you are looking for from the relationship. Be clear and specific!**

## MENTORSHIP VS. SPONSORSHIP

A **mentorship** is a relationship between someone sharing knowledge and providing guidance (mentor) and someone learning from that person's experience and example (mentee). Typically, a mentor is experienced in the workforce and the mentee is someone looking to grow and/or is new to the workforce.

A **sponsorship** is a relationship between protégé and a person who has authority or influence to help them in their career development. Sponsors can open opportunities, nominate, and advocate for you.

## Mentoring FAQs

### What does a mentor do?

- Coaches an associate in enhancing skills and intellectual development
- Passes along organizational information (structure, politics, personalities)
- Provides candid feedback to the associate about perceived strengths and developmental needs

### How does someone find/get a mentor?

First and foremost, mentors and associates should “**self-select each other.**” When looking for a mentor, a person should spend a lot of time thinking about his or her mentoring needs and investigating possible mentors. A good way to do this is by “**asking around**” to get feedback about who might be an appropriate mentor for the individual.

Good sources of information are first and second level supervisors and others who know the individual and/or prospective mentors. Before any commitments are made, individuals should meet with several potential mentors. Sit down and discuss **career aspirations**, what each person expects from the mentoring relationship, and learn more about each other as individuals before selecting your mentor(s).

### Can a mentor be from another organization?

This is certainly possible but should be given careful thought. A drawback is that an outside mentor may not have much knowledge of the **internal operations**, issues, and priorities of the associate’s organization, or know many key people in the organization. This could limit the mentor’s ability to help the associate identify developmental and career opportunities within the organization.

In such a case, an individual may wish to find a second mentor, within the organization. Another consideration is geographic proximity – a mentor and associate who do not work near one another tend to have a difficult time cultivating the relationship.

## What types of activities can a mentor suggest besides formal training?

Formal training is just one, small part of leadership development. When thinking about appropriate developmental activities, be **creative**! Some things to consider:

- Reading books, articles, journals, news publications, etc.
- Trying new projects/special assignments
- Giving presentations
- Joining or chairing a team or panel
- Involvement in “Corporate projects/task forces/organizational change efforts
- Representing the supervisor at meetings
- Switching jobs with a coworker for a short period of time
- Professional society participation
- Conference/symposiums
- Organizational presentations/special effects
- Authoring professional publications
- Teaching subject matter courses
- Mentoring a junior associate

## What are some signs of a successful mentoring relationship?

- The mentored associate is open to change and transition, to exploring possibilities, helping others, and learning from others
- Both parties are inspired by the relationship and gain a great deal of satisfaction from it
- There is a commitment to understanding and growing, and to confronting and working toward solutions to problems that may arise