

Your First Mentoring Meeting

The following is a guideline to assist structure your first meeting.

Before The Meeting:

Plan

Be sure to spend some time planning how you are going to facilitate/participate in your meeting to ensure you maximize your time together and benefit from the meeting.

Prior To The Meeting Consider

- What expectations do you have of the mentoring partnership?
- How will you ensure/manage your expectations so they are achieved?
- What measurement systems do you have/need to monitor that you are on track to achieving your expectations?
- What actions need to be taken if your expectations are not achieved?

Step	Action
1	Thank attendee(s) for their time and spend some time building rapport (even if you already know them).
2	Get To Know each Other Share an overview of your: <ul style="list-style-type: none">○ Background○ Position○ Experiences○ Key achievements, etc.
3	Discuss Goals <ol style="list-style-type: none">1. Mentor2. Mentorees <ul style="list-style-type: none">○ Objectives of the relationship○ Visions for future○ Personal objectives e.g. Networking, understand culture, etc.○ Business objectives e.g. improve results in xxx area by xxx%, etc.○ Life goals and passions
4	Agree Expectations For Meetings <ul style="list-style-type: none">○ When will the meetings be held?, i.e. Time of day, week, etc.○ How often will you meet?, i.e. Bi-weekly, monthly○ Where will the meetings be facilitated?, i.e. Location, venue○ Who will arrange the meetings?

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Step	Action
5	Agree Roles And Set Expectations (of each other) Explore, share, discuss and agree: <ul style="list-style-type: none"> ○ Partnership vs. dependency ○ Proactive vs. reactive ○ Mentor, line manager, mentoree relationships and roles ○ Personal support vs. performance management ○ Skill development – whose responsibility? ○ How your expectations support the overall goal of the programme ○ How to manage these expectations
6	Set Partnership Agreements Agree on: <ul style="list-style-type: none"> ○ Confidentiality – definition, level, and meaning ○ Conduct & behavioral standards ○ Commitments outside partnerships ○ Time frames/constraints ○ Mentoring relationship duration/end date ○ Other professional relationships ○ Accessibility ○ Ground rules ○ Feedback ○ Skills, knowledge and experience to be developed ○ Performance monitoring ○ Consequences for performance/non performance or compliance/non-compliance of agreements ○ Line managers involvement in mentoring relationship ○ Monitoring usefulness of relationship to all parties ○ Ways out of the mentoring relationship if it is not working ○ How/when you expect the formal relationship to terminate
7	Plan next step <ul style="list-style-type: none"> ○ What action is required ○ By when ○ Set date for next meeting ○ Consider what you want to achieve from the next meeting
8	Acknowledgements <ul style="list-style-type: none"> ○ Thank each other for their commitment and time ○ Close meeting

Subsequent Mentoring Meetings

Follow these guidelines for subsequent mentoring meetings unless circumstances change for either party. If this occurs, revert back to the First Meeting Structure as a guideline for resetting the context for the relationship.

Step	Action
1	Welcome & acknowledge the attendee(s) for giving their time. Spend some time building rapport (even if you already know them).
2	Set Expectations For Meeting <ol style="list-style-type: none"> 1. Mentoree 2. Mentor <ul style="list-style-type: none"> ○ What do you want to achieve from the meeting? ○ Confirm time available for the meeting
3	Discuss The Past Meeting And Actions <ul style="list-style-type: none"> ○ Update on events/actions since last meeting
4	Debrief Issues <ol style="list-style-type: none"> 1. Discuss and debrief successes 2. Discuss and debrief challenges <ul style="list-style-type: none"> ○ What happened? ○ Why? ○ What can you learn from that? ○ What actions have been taken to integrate the learning? ○ What will you do next time?
5	Review Expectations Of Relationship <ol style="list-style-type: none"> 1. Mentoree 2. Mentor <ul style="list-style-type: none"> ○ Are your expectations being achieved? ○ If not, what needs to happen to ensure expectations are achieved? ○ Review the relationship - are both parties happy with how it is progressing? <p>Note: If relationship is not progressing effectively identify appropriate action, i.e. can the relationship be improved? How? Or should the mentoring relationship be put on hold/terminated? Who needs to be involved/notified of actions?</p>
6	Action Plan <ul style="list-style-type: none"> ○ What action/development is required? ○ By when? ○ Set date for next meeting ○ Consider what you want to achieve from the next meeting ○ Summarize agreements and commitments – gain agreement
7	Acknowledgements <ul style="list-style-type: none"> ○ Thank attendee(s) for their commitment and time ○ Close meeting