

PLANNING THE FIRST MEETING

Before you undertake anything significant in your life that's new, it is important to do some planning. This worksheet walks you through some steps to plan a first meeting with your protégé. Your protégé will be creating a similar worksheet; you may want to send your version of this worksheet to your protégé so you can both prepare for your first meeting.

Basic Background Information

My protégé's name is _____

Nickname (if any) _____

Phone number(s) _____

Email address _____

Best time to call _____

What would I like my protégé to call me? _____

Preparing for the First Meeting

Typically, the first meeting allows two people to get to know a little bit about each other, attach a face to a name and gain a bit of comfort. To do so, you need to think about what setting would feel comfortable for both of you, and plan some conversation starters knowing that these are tools if you need them.

(1) Where might I meet with my protégé where we both would feel comfortable? List a few ideas below.

(2) What are some things I could tell my protégé about myself that would help us get to know each other a little bit? What details about me and my life story might be interesting and relevant to this protégé?

(3) What are some questions I could ask my protégé to get to know him/her a little bit without prying? (Write some possible open-ended questions below. Note: you want to be sure that these are questions cannot be answered with a 'yes' or 'no.')

STRATEGIES FOR SUCCESS IN MENTORING

(4) What do I want out of the mentoring relationship – what are my hopes?

(5) How can I find out what my protégé hopes to get out of the relationship – what questions might I ask?

It is recommended that you look over your answers to this planning sheet shortly before your first meeting with your protégé. You might even bring it along to use as a bit of a roadmap for both of you. Use your judgment – but remember to review your responses before the meeting – this will make you more comfortable and relaxed. The results of your first meeting will have an important place in your mentoring logbook. Do not forget that you must keep track of this first meeting, and all other meetings (Appendix A).

You should expect that your protégé will have prepared a preliminary Development Plan to go over during the meeting. Be careful to listen to your protégé regardless of your own preparation. Ask him/her about their strengths or weaknesses. What do they need to work on? How do they see opportunities for growth within their careers? They should be prepared to talk about their goals.