

**PROTÉGÉ'S CHECKLIST OF TASKS**

**Directions:** The following are suggested tasks or activities you can complete as you work with your mentor. They are suggestions only; tailor the list to your needs, your style, and your mentor's style. One way to use the list is to check the tasks you plan to do (left box), then check it off (right box) as the task is completed.

**I. PREPARING FOR THE PARTNERSHIP**

**Plan to Do – Done**

1.   Read through all available materials on mentoring. Check the library and internet.
2.   Review your past mentoring experiences for insights to use in this new mentoring partnership.
3.   Talk with your manager about your participation in the program, your goals, and ideas for development activities.
4.   Complete any mentoring program application procedures.
5.   Attend any seminars or other training events available for mentoring.
6.   Prepare Goals and Objectives from the materials in Chapter 3.
7.   Design a Potential Contract based on the guidelines given in Chapter 3 or use the model.
8.   Think through how you would like your mentoring partnership to operate, including any limits to set (e.g., maximum amount of time you or your mentor can spend).
9.   Keep a log or diary of your interactions with your mentor. Include notes on knowledge or skills gained and commitments made. A logbook is provided in Appendix A.

**II. IMPLEMENTING THE MENTORING PARTNERSHIP**

**Plan to Do – Done**

10.   Meet with your mentor by phone or in person at (time, date, location).
11.   If possible, obtain more information about him or her prior to the meeting,
12.   Prior to meeting with your mentor, review your organization's availability of training and development and see how those align with your personal tentative goals.
13.   If appropriate, arrange a three-way meeting between you, your mentor, and supervisor to clarify roles and agreements.
14.   List goals for your development.
15.   Be ready to share with your mentor any feedback you received on your strengths and areas for improvement.

## **STRATEGIES FOR SUCCESS IN MENTORING**

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16.   Be prepared to discuss the mentoring partnership in detail, including:
  - What you would like to receive in knowledge, skills, and resources
  - The roles each of you will carry out
  - Any limits (e.g., maximum time you have available) you must set for the partnership
  - Times to meet in person and by phone
  - The anticipated length of the mentoring partnership (12 months unless you agree to terminate sooner)
  - The date of your next meeting
17.   Make changes, as appropriate, in your development plan.
18.   Wait for your mentor to introduce you to people who may be helpful to you. Ask for specific ways you should (and shouldn't) approach these individuals.
19.   Study and be prepared to discuss resources loaned to you by your mentor. Keep track of them in your logbook.
20.   Agree to attend meetings with your mentor. Determine your role in these meetings.
21.   Afterwards, debrief the meetings with him, listening to explanations of what happened. (If not offered, ask for your mentor's input on the dynamics of the meetings.)
22.   Exchange information with other protégés.
23.   Continue to meet in person or on the phone with your mentor on a regular basis.
24.   Follow through promptly on every commitment you make to your mentor. If you're delayed, let your mentor know the reason immediately.
25.   Agree to contact and get assistance from individuals suggested by your mentor. Let him or her know how these interactions turn out.
26.   Learn directly from your mentor:
  - Ask your mentor to relate his or her "career story" including how decisions were made
  - Ask about specific techniques your mentor has used to work with clients, customers, colleagues, and others
  - If appropriate, observe your mentor performing the skills you want to develop
27.   Ask for constructive feedback on your ideas and performance.
28.   If appropriate, ask specific questions about the organization, including policies, procedures, culture, and politics.
29.   Ask for coaching on a presentation you must make.
30.   Complete evaluation activities:
  - If in a program, complete the periodic evaluation/feedback activities requested by your coordinator.
  - Complete reviews sent via e-mail from the mentoring coordinator.
  - With your mentor, discuss what you both concluded from the review, including any improvements you would like for the remainder of your mentoring relationship.
31.   Regularly show appreciation for your mentor's time and interest.

32.   As part of your program, regularly provide information about your mentoring relationship to your company's program coordinator.
33.   Periodically discuss your mentoring relationship with your direct supervisor.

### **III. REVIEWING ACCOMPLISHMENTS AND TAKING NEXT STEPS**

Toward the end of your agreed-upon time period, reflect on what you've accomplished over the entire period.

#### **Plan to Do – Done**

34.   Complete final evaluation activities.
- Complete evaluation/feedback activities requested by your program coordinator
  - Complete Mentoring Experience: Final Review
  - Meet in person or by phone with your mentor to discuss the status of your development activities and goals, your partnership, and any "unfinished business"
35.   Follow up your closure meeting with a note or letter of thanks.
36.   Complete any program closure activities.
37.   Continue to touch base with your mentor in the future.
38.   If appropriate, seek another mentoring partnership.

Revised (with permission), from Phillips-Jones, L. (2000) *The Mentee's Guide: How to have a Successful Relationship with a Mentor*. (With permission.) (CCC/The Mentoring Group. 13560 Mesa Drive, Grass Valley, CA.)