The Mentee/Protégé Guide

A Mentoring Guide for the Mentee/Protégé
Benefits of Mentoring

“If I have seen further than others, it is by standing upon the shoulders of giants.”
~ Isaac Newton

Accelerate success in specific goals and objectives

Discover fresh perspectives and feedback through observation

Explore and surmount specific challenges and obstacles to success

Improve knowledge, skills, abilities, wisdom, insights, ideas, strategies, and approaches

Benefits of being a Mentee/Protégé
2 Ways We Develop Ourselves

**Training**

- Workshops
- Classes
- Tutoring
- Webinars
- Seminars

**Mentoring**

- Apprenticing
- Job shadowing
- Roundtable
- Task force / workgroup
- Sponsoring
- Peer advising
- New buddy
What is Mentoring?

A partnership, a relationship, an engagement, a conversation

One person (Mentor) contributing to the growth & development of another (Mentee/Protégé)
Best Practices for Establishing Effective Mentoring Relationships

1. Identify expectations and goals for working together
2. Meet on a consistent, regular basis (ex: weekly or monthly)
3. Engage in mentoring conversations (see “Resources” for explanation)
   - Use the art of questions to explore career experiences & aspirations
4. Be held accountable by Mentor
   - Request constructive feedback and objective observations
5. Mentor and Be Mentored
   - If you are the Mentor, be mentored by someone else
   - If you are a Mentee/Protégé, be a Mentor for someone else
9 Steps in the Mentoring Process

1. Prepare for mentoring by identifying goals and outcomes
2. Connect to potential mentoring partners
3. Explore expectations; and agree to engage in mentoring
4. Create a structure for working together
5. Establish trust by getting to know each other
6. Drive goals forward with guidance and accountability
7. Engage in mentoring conversations
8. Offer and accept observations and feedback
9. Complete the commitment; redefine the relationship
The Mechanics of the Mentoring Experience

- **Stage 1: Prepare for Mentoring**
  - Register online
  - Complete a personal profile
  - Understand your role
  - Create goals and desired outcomes for engaging in mentoring

- **Stage 2: Connect to Potential Mentoring Partners**
  - Getting matched by Mentors and Mentoring Champion Team

- **Stage 3: Explore Expectations; Agree to Engage in Mentoring**
  - What does each mentoring partner expect the other?
  - How will you meet those expectations?
  - Does Mentor’s experiences and availability match Mentee/Protégé’s needs and desires?

- **Stage 4: Create a Structure for Working Together**
  - Set up expectations, structure, commitments, goals

- **Stage 5: Establish Trust by Getting to Know Each Other**
  - Create rapport and trust between mentoring partner

- **Stage 6: Drive Goals Forward with Guidance and Accountability**
  - Accountability

- **Stage 7: Engage in Mentoring Conversations**
  - 5 types
    - Connecting
    - Navigating
    - Teaching
    - Observing
    - Advising

- **Stage 8: Offer and Accept Observations and Feedback**
  - Mentee/Protégé has responsibility to ask for Feedback
  - Mentor has responsibility to give feedback and share observations
  - Identify opportunities for observation

- **Stage 9: Complete the Commitment; Redefine the Relationship**
  - Determine how you will keep in touch
  - Ascertaining what is next for each of your development
  - Cultivate the network
Advice for Being an Effective Mentee/Protégé

Seek out Greatness
- Look for someone who has experience in areas that you need
- Look for someone who is interested in mentoring and interested in contributing to you

Set Goals for Relationship
- Do you need a new skill? (ex: making a presentation or interviewing new people)
- Are you facing a new challenge? (ex: building a team for a new project)
- Are you avoiding a conflict? (ex: a miscommunication with a colleague)
- Be clear about your goals – write them down
- Think big, and then break them down to accomplishable bites
- Use goal setting worksheet to clarify your goals *(a form is available in the Resource Center)*
- Choose different Mentors to help you accomplish different goals

Create Structure
- Define length of mentoring partnership and goals that you’ll work on together
- Schedule regular meetings
- Create structure Mentoring Agreement
- Set clear objectives for each meeting
- Confirm your meeting the day before via email to your Mentor

Do the Work
- Track your own progress
- Put your Mentor’s guidance into practice early and often
- Keep your commitments to your Mentor
- Ignore your excuses – Ask yourself: what are we going to do about it?
- Keep a mentoring notebook or document your experience in the Mentoring Connection Log on the mentoring website

Stay on the Radar Screen
- Send a weekly email to your Mentor with a status report
- Send emails with questions or topics that you want to cover in your next meeting
- Remind your Mentor of your scheduled call or meeting and send an agenda

Be Curious
- What do you want to know from your Mentor?
- Show up to your meeting with questions for your Mentor
- Rely on your Mentor to share experiences and offer guidance and perspective
- Ask a lot of questions
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Be Honest
- Be honest about your development needs
- Be willing to accept ideas, resources, guidance, feedback from your Mentor
- Don’t be a “yeah, but”
- Be open to feedback from your Mentor
- Give your feedback – what is working and not working in your relationship?

Listen and Share
- Share accomplishments, challenges, frustrations (avoid gossiping)
- Listen for feedback, ideas, advice
- Implement guidance your way; you don’t need to do it Mentor’s way

Expand Each Other’s Worlds
- Provide connections and resources for your Mentor
- Introduce him/her to people in your network

Transition On
- Complete your relationship with a debrief
- Show your appreciation for your Mentor’s time
- Provide feedback on mentoring skills learned
- Stay in touch with your Mentor
- Periodically update your Mentor on your progress, even after relationship is complete
- Show Mentor the impact he/she has had on you
- Cultivate and maintain the relationship you created
- Be a Mentor to others

Add your own advice that you’ve learned since serving as a Mentee/Protégé:
Expectations

Circle the top 5 Expectations below that you feel will contribute most to the success of your mentoring partnership.

- Own the mentoring partnership and your career
- It is your responsibility for keeping the partnership on task
- Communicate weekly with mentoring partner to confirm meetings and touch base
- Prepare for every meeting
- Ask questions and take notes
- Have clear goals and expectations to work on and accomplish
- Understand my mentoring partner’s role at the company
- Respect, appreciate, and value the opportunity to learn from your mentoring partner
- Follow up and follow through on all commitments made
- Communicate with Mentoring Champion about participation and progress
- Communicate with your supervisor about your participation and your progress
- Show up to training sessions and to all scheduled meetings
- Execute – do the work, don’t expect the work to be done for you
- Employ the guidance, encouragement, and advice received from Mentor
- Always be open to constructive feedback and objective observations
- Connect with other Mentees/Protégés to build your network at the company
- Be a role model
Commitments

By the end of your mentoring partnership, you should have accomplished the following . . .
(create commitments at the beginning of your relationship to ensure intentionality and effectiveness)

☐ Meet w/ Mentoring Partner on a Scheduled Basis
  • **Example:**
    - Monthly for an hour
    - Weekly for 15 min touch-base call

☐ Observe and Offer Feedback
  • **Example:**
    - Create opportunities for Mentee/Protégé to shadow Mentor
    - 2 opportunities for Mentor to shadow Mentee/Protégé
    - Give/get feedback from shadowing experiences

☐ Skill Practice
  • **Example:**
    - Identify a skill Mentee/Protégé wants to improve
      (ex: leading a meeting)
    - Practice the skill with Mentor in role-play and on-the-job experiences

☐ Checklist of Knowledge, Skills, and Abilities
  - Review/Assess Mentee’s/Protégé’s knowledge, skills, and abilities that they must know in their current or aspired role

☐ Complete a Project / Deliverable *(see next page for ideas)*
  • **Example:**
    - Assessment of Potential and Opportunities for Ongoing Development
    - Leadership Insights
    - 5-year Career Plan

☐ Deliver Feedback on Mentoring Experience
  • **Example:**
    - Feedback to your mentoring partner
    - Feedback to the Mentoring Champions
Additional Examples of Commitments

☐ Attend Mentoring Training with Mentor
☐ Attend a Goal-Setting Training
☐ Attend Mentee/Protégé-only Mid-Mentoring Training
☐ Attend Success @ Work webinars
☐ Attend Success @ Mentoring webinars
☐ Sign confidentiality agreement with Mentor
☐ Meet Mentor in person at a minimum 1x/week for 1 hour
☐ Be available and touch base with Mentor in between meetings via phone, email
☐ Observe Mentor at work at least once
  ☐ ex: running or participating in a meeting, making a presentation
☐ Identify opportunities for Mentor to observe Mentee/Protégé in 3 different situations
  ☐ ex: situation debrief, running a meeting, giving feedback, making a presentation
☐ Schedule a conversation between Mentor and Mentee/Protégé’s supervisor
☐ Deliver the Mid-Mentoring Dashboard - assessment of progress and program
☐ Deliver the end-point feedback on mentoring experience
☐ Deliver Leadership Insights Report (see Deliverable examples)
Sample Deliverables

Mentee/Protégé: Leadership Insights Document

The purpose of the leadership insight document is to discover Mentor’s approach to and perspective on leadership.

Areas to Cover

- What did you learn about leadership from your Mentor?
- Describe ways that you saw leadership in action in your Mentoring Partnership?
- From your perspective, what is the difference between managing and leading?
- What problems does your Mentor solve in his/her day-to-day role? How does he/she use leadership to solve those problems?
- What kind of leader are you now and what kind of leader do you want to evolve into?

Mentor: Assessment of Mentee’s/Protégé’s Potential & Opportunities for Growth

Assess your Mentee/Protégé’s leadership potential and opportunities for further growth and development. This “Leadership Assessment” will be based on your unique perspective, interactions, observations, and relationship throughout the year.

Areas to Cover:

- Ability and potential to be an effective leader at the company
- Leadership skills and competencies
- Ownership of root causes and progress in implementing Mentor’s recommendations
- Major development milestones this year
- Career/professional aspirations
- Mentor’s recommendations for additional experiences, training, and opportunities for Mentee’s /Protégé’s further growth and development
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Structuring the Terms of Your Mentoring Engagement

Instructions: Set yourself up for success by creating the structure for your time together.

Terms of Engagement

Mentoring Engagement Start Date: ________________________________
Mid-point Meeting Date: ________________________________

Observation Dates: __________________________________________
Observation Dates: __________________________________________

Mentoring Engagement End Date: ________________________________

Weekly Meetings    ex: every Friday @ 8:00am for 1 hour in Mentor’s office

Day(s): __________________________________________
Time: __________________________________________

In-Between-Meetings Questions:
(Indicate your preferred method of communication)

☐ email    ☐ phone    ☐ drop-in    ☐ schedule a meeting

Desired Outcome for Engagement:
[in addition to the Deliverables, what do you want to accomplish?]
Suggested Format for Weekly Meetings

Mentor to ask Mentee/Protégé:

- What did you accomplish this week/month regarding your goal?
- What was your biggest challenge this week/month in driving your goals forward? What have you done so far to address it?
- What did you discover in the process?
- What frustrated you in working on your goals?
- What information, resources, and connections do you need in order to keep moving forward?

Mentor and Mentee/Protégé to Discuss:

- Mentor’s observations of Mentee/Protégé and progress on goals
- Mentee’s observations of Mentee’s/Protégé’s own progress
- Competencies and alignment with Mentee’s/Protégé’s goals
- Mentee’s/Protégé’s current work projects
- Performance management cycle, if appropriate

Additional Suggestions:

- Use the Mentoring Log to record notes, action items, ideas, discoveries, and observations during each meeting/call.
- Review the list of Commitments at the end of each meeting to assess progress
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Mentoring Log

Instructions: Record notes, action items, and observations from each meeting/conference call.

Date: ____________________  ☐ Phone  ☐ Email  ☐ In-Person Meeting

Topic: _____________________________

Accomplishments from last meeting: _____________________________

Challenges faced and Solutions attempted: _____________________________

Mentor’s Feedback/Recommendations: _____________________________

Mentor Action Items for next meeting: _____________________________

Mentee/Protégé Action Items for next meeting: _____________________________

Date of Next Meeting: _____________________________  ☐ Phone  ☐ Email  ☐ In Person Meeting

Observations of Self/Mentoring Partner:

Other Notes:

☐ Review Commitments and Deliverables
5 Types of Mentoring Conversations and Scripts to Engage in Each

1. Connecting
   - For “Connecting” conversations, Mentee/Protégé and Mentor explore resources and connections.
     Mentee/Protégé Script:
     o “Based on my goals, what is your recommendation for what I should be reading? What events should I attend? With whom should I connect?”

2. Navigating
   - For “Navigating” conversations, Mentee/Protégé and Mentor explore the industry, the company, and potential career paths.
     Mentee/Protégé Script:
     o “What do you think a leadership career at the company looks like?”
     o “What do you think of the latest healthcare bill?”

3. Teaching
   - For “Teaching” conversations, Mentor teaches Mentee/Protégé the inside scoop, the unwritten rules, the way to get things done. Sometimes the Mentor teaches skills, functional competencies, and knowledge of role.
     Mentee/Protégé: “What suggestions do you have for improving my leadership skills?”

4. Observing
   - For “Observing” conversations, Mentor inquires about Mentee/Protégé’s progress on action items from last meeting and progress on goals and makes observations that contribute to Mentee/Protégé.
     Mentor: “Would you like some feedback?”
     Mentor: [review Mentee/Protégé’s deliverables]
     “Last time we met, we agreed that you would…. Please update me.”
     Mentor [in response to any excuse that Mentee/Protégé offers for not doing an action item]:
     “I understand. So, what are you going to do to get the results you want?”

5. Advising
   - For “Advising” conversations, Mentee/Protégé seeks Mentor’s advice, wisdom, and lessons learned. Mentor helps Mentee/Protégé think through options and provides his/her feedback on Mentee/Protégé’s options and solution chosen.
     Mentee/Protégé: “Here is what happened this week and what I did. What do you think? What would you recommend that I do differently in the future?”
     Mentor: “What do you think you can do differently next time based on the outcome?”
     Mentor: “Here’s what I would have done, based on what has worked for me in similar situations.”
Script for Making Observations and Holding a Mentee/Protégé Accountable

6 Characteristics of Observations that Serve as Mentoring Contributions:

1. Clearly define purpose of feedback/observation
2. Be specific and descriptive - use facts, not emotions or judgments
3. Provide relevant information
4. Make it actionable feedback/observation
5. Be timely with your feedback/observation
6. Provide an opportunity for other person to respond and then listen intentionally (not passively)

SCRIPT

1. **Ask Permission**
   “Would you be open to some feedback?”

2. **Share Observations/Experience [can be reinforcement or redirection]**
   “I have noticed recently…”
   “I have observed lately that you…”
   “My experience is….”

3. **Understand their Perspective/Experience**
   “What’s your experience?” [listen intentionally to your Mentee/Protégé’s answer]

4. **Describe the Impact**
   “As a result, you come across as rather . . . professional / unprofessional / rude / strategic.”

5. **Explore Options**
   “Let’s see what we can do to address the situation.”
Components of Your Mentoring Program:

- Mentoring Groups
- Mentoring Website
- Success @ Work Webinars
- Success @ Mentoring Webinars
- Mentoring Tools

5 Easy Steps to Get Started

1. Register for access
2. Set up your Personal Profile
3. Access List of Participant
4. Review the Resources and Tools
5. Get Connected fast!