

Mentoring Relationship Development Plan

An earlier version is published in *Power Mentoring: How Successful Mentors and Protégés Get the Most Out of Their Mentoring Relationships* with Susan Murphy (2005), Jossey-Bass, San Francisco.

Directions to mentors and mentees

This is a template for you to use. There may be some items on here that resonate and really appeal to you. Other items may make you uncomfortable and not appeal to you. I would encourage you to consider each section carefully and feel free to add to or skip around as needed. This is YOUR relationship and while I have provided a suggested structure, ultimately you know what works best for you. Please use what is useful and ignore the rest!

1. Getting to Know Each Other

Exercises/Assessments

1. Consider getting to know each other's strengths by reading the book *StrengthsFinder 2.0* by Tim Rath and completing the assessment. Check out www.strengthsfinder.com for more information.
2. Consider getting to know each other's personality and communication styles by each taking the True Colors Assessment and discussing it. I have provided information for you in your handouts. For more information, visit www.true-colors.com.
3. Consider discussing core values. I have provided you with a list of top values. Feel free to add to this list any that you feel are missing. Identify the top five, and then eliminate one, eliminate another one, and so on. Ultimately, you will be left with one core value that you feel is most important. Discuss with each other.

Getting Acquainted Categories/Discussion Questions

Consider discussing:

- **Work and professional background**
You may want to exchange bios and resumes prior to meeting. I also find it useful to check out LinkedIn profiles just to get some general background. Questions to consider: What was your best and worst experience? What were your most compelling lessons learned? Why did you choose the jobs you did?
- **Past professional and personal successes**
Questions to consider: As you reflect on your career so far, what are several of your successes that you are most proud of? Personal successes?
- **Past professional and personal difficulties**
Questions to consider: What have been some unwanted learning experiences in your career? What have been some of your greatest challenges or obstacles? What are you still working on that is challenging for you?

- **Times when you had to demonstrate resilience**

Questions to consider: What have been some times when you have had your powers of resilience tested? Are you resilient and what do you do to be resilient?

- **Interests**

Questions to consider: What are your top three interests professionally? Personally? What are your favorite leisure activities or what would they be if you had the time to have any?

- **Dreams and aspirations**

Questions to consider: If you had to write your obituary, what would it say? What do you hope to accomplish in the next year? Next five years? What is your definition of success?

- **Your names and their significance**

What is the origin of your name and how do you feel about that? What is your family of origin and what groups do you identify with?

- **Education**

Questions to consider: Where were you educated? Who were your best teachers and advisors and what did you learn from your different educational experiences?

- **For fun**

Questions to consider: If you had a time machine, where would you go and who would you meet? What are your guilty pleasures (that you can share), such as watching reality TV or reading People magazine? What is your favorite trip? What are some things on your bucket list? When you are not working, what is your favorite thing to do or place to be? What are your favorite movies or TV shows and why?

- **Others**

What questions do you like to ask people as you get to know them? How else can you discover similarity? Complementary skills?

2. Getting to Know Each Other

Consider discussing:

- How do I work best?
- How do I work?
- What is my style?
- When are the best times to approach me?
- What are my core values that help me make decisions at work?
- What is the best way to communicate with me?
- What are some habits or situations I absolutely will not tolerate?
- How do I feel about giving feedback? Receiving feedback?

- What is the best way that others can help me to be successful?

3. How Are We Similar to and Different from Each Other?

- Work style?
- Personality and/or strengths?
- Values?
- Goals
- Interests?
- What else?

4. Goal Setting

We have agreed on the following goals as the focus of our mentoring relationship.

Our goals for the next 3–6 months:

- 1.
- 2.
- 3.
- 4.
- 5.

Action steps for mentor:

Action steps for mentee:

Our goals for the next 7–12 months:

- 1.
- 2.
- 3.
- 4.
- 5.

Action steps for mentor:

Action steps for mentee:

Long-term goals in general:

- 1.
- 2.
- 3.
- 4.
- 5.

Discussion of action learning project:

Consider the value of a mutually beneficial action learning project that is of interest and value to both the mentor and the mentee. What are some ideas? What would be some reasonable deliverables?

Action steps for mentor in relation to action learning project:

Action steps for mentee in relation to action learning project:

5. Anticipating and Overcoming Challenges Together

What are the anticipated challenges that we might face? Typical ones include geographical distance, time on other tasks, technological failure, cultural gaps, and simple miscommunication.

What do we anticipate as challenges?

How do we commit to overcoming these challenges?

6. Logistics/Communication

- When will we meet next? In the future?
- Where will we meet and how will we communicate on an ongoing basis? Do we like to text? Have phone appointments? Use email? Instant message? How do we feel about being Facebook friends? LinkedIn? Twitter followers?

- How often will we meet?
- Who will initiate? (I suggest the mentee.)
- How will we make future plans and adjustments (use Outlook, text each other, etc.)?

7. Next Steps

- Our next meeting is? (where, when, and how)
- Our agenda is?
- What was not asked in this plan but we still want to discuss?