

Torch

Partnership Kickoff Worksheet

Suggested agenda for your kickoff call with your partner

- 15 mins – Get to know each other personally and professionally
- 10 mins – Mentee goals and mentor insights for the partnership
- 10 mins – Key challenges mentee is facing right now and how you will work together on them
- 10 mins – Define Partnership Charter
- 5 mins – Schedule next meeting and discuss action items

Notes about my partner

Professional:

Personal:

Mentee's professional landscape

Current Role and Title:

Reports to:

Top 2-3 Responsibilities:

Team:

1.

Location:

2.

Size / # of Direct Reports:

3.

Level in Org.:

Other key stakeholders:

High level notes on goals:

Discussion topics to consider:

1. Professional and personal introductions

- Provide insights into your current role and responsibilities, challenges, likes and dislikes.
- Share personal backgrounds and life experiences - hobbies, interests, education, work history.

2. Goals: Career, personal and organizational

- Share your needs, desires, goals, and challenges in terms of career choice and mobility.
- Explore the people, resources, information, expertise you need – but don't have – to speed up, enhance, and ensure your results.

Partnership tips and best practices:

1. **Engagement and commitment:** Mutual commitment to meet for the next 6 months, every 2-4 weeks will help the two of you stay on track and work towards your goals. If you have a conflict with a meeting date or need to extend out the time between sessions, communication is key. Let each other know, ensuring you are in agreement to any changes. Mentee, you are the driver of your learning and need to ensure meetings get scheduled and you come prepared with an agenda or list of things you'd like to work on.
2. **Be open and transparent / honor confidentiality:** Mentee, talk candidly about the skills you are working to improve and the challenges you face in your role. Trust this is a safe and confidential space to share and to learn. The only way to do that is if you acknowledge and mutually agree to confidentiality. It's critical.
3. **Feedback:** Communicating what is working and what is not will help you both make good use of the time you are working together. Share wins, talk about successes, and discuss the things you are learning along the way. On the flip side, if advice isn't relevant or you are struggling to take action on suggestions or ideas, make sure you talk about that, it will help you make the best use of your time together.

Our Partnership Charter (here are the things we will agree to, to ensure we are maximizing our partnership experience and are respectful of each other's time, engagement and commitment to this experience):

What do we expect from each other in terms of time commitment and deliverables? And what do we each agree to commit to?

What is our individual learning style/preference and how will that influence how we work together?

What is our preferred method of communication for meetings and are we open to communicating between meetings? If so, how?

What will our approach be to share key learnings/wins along with any frustrations that may come up?