

Meeting plan – first mentorship meeting

This document helps to give an outline for how to conduct your introductory mentorship meeting.

This completed plan does not need to be sent to Intelligent People but should be shared between the mentor and mentee to be referred to throughout the mentorship.

Mentee:	
Mentor:	
Date of the first meeting:	

Suggested areas to cover in this mentorship:

- The introductory meeting should help the mentor and mentee to get to know each other better. This could include current job role, company, skill sets, career to-date etc
- The mentor and mentee should establish realistic and achievable top-line goals for the mentorship. These top-line goals should be recorded within this document
- An in-depth action plan for goals should be completed after this meeting using the '[Goal setting plan](#)' template.
- The mentee and mentor should agree the scope of the mentorship; how often meetings will take place, the channel of communication preferred (face-to-face / virtual) and when is suitable. The length of each meeting should also be agreed
- The length of the mentorship / number of mentorship sessions should be agreed at this initial meeting
- The mentor and mentee should confirm they have both read the [Mentorship expectations document](#), and agree to their roles and responsibilities as detailed

Discover the purpose of the mentorship – questions for mentee:

In preparation for the first meeting, the mentee could consider answers to these questions:

- Where are you in your career?

- Where do you want to be in 5 years?
- What career paths interest you? What do you want to change in your career?
- What challenges / obstacles are you facing?
- What are you currently doing to meet your goals?
- What skills do you want to acquire?
- Who are your role models and why?
- Who is in your current network? Who do you want to add to your network and why?

Top-line mentorship goals:

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Meeting logistics:

Our guidelines for meeting logistics are listed below. Please note, this is only a guide, and you should agree meeting logistics for your mentorship

- You should aim to meet every 4-6 weeks for 1-2 hours.
- You should be accessible for contact by telephone and email as necessary between meetings
- You should aim for your mentoring partnership to last at least 6 sessions, if not more
- The mentor will advise Intelligent People of any breakdown in the relationship or ending of the relationship after the agreed time.

Agreed meeting logistics:

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Confidentiality:

Any sensitive issues that should be discussed / issues that are off limits for discussion include:

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Goal setting:

Once initial top-line goals have been set, the mentee should use the Goal setting template to record these goals in more detail. The [blog Setting SMART goals](#) could be used as a resource to help completing these goals.

[Goal setting template](#)

Plan for evaluating relationship effectiveness:

How are you going to measure the effectiveness of the mentorship together? This should be agreed upfront and could include a quarterly review of mentorship goals, regular feedback requests, or other means specific to the career plan.

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Other meeting notes:

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Next meeting agreed:

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