

Set your mentorship up for success! Use this worksheet to guide your first meeting and establish a solid foundation for your mentorship journey.

Communication Guidelines

- **Contact Information:** Exchange relevant details for easy communication.
- **Preferred Communication Method:** How do you prefer to connect (e.g., email, phone, text, etc.)?
- **Availability:** What days/times work best for you? Please consider time zones.

Meeting Location

In-Person Meetings:

- Do you live near each other?
- Are you both attending any upcoming events?

Virtual Meetings:

- Video conferencing
- Email
- Phone
- Text

Meeting Frequency

How often would you like to meet?

- Monthly
- As needed
- Other (please specify)

Meeting Duration:

- 1 hour
- 30 minutes
- Flexible depending on needs

Agendas

To ensure productive meetings, **mentees** should create and send an agenda to their mentor at least a few days before each meeting. This allows the mentor time to prepare and be ready to dive into the topics. Example agenda items may include:

- Review of previous goals and action items
- Discussion of challenges and opportunities
- Goal-setting for the next phase
- Providing and receiving feedback
- Creating an action plan
- Sharing resources or recommendations
- Confirming next meeting date and time

Pro Tip: Download agenda templates and learn more about structuring effective meetings.

Meeting Notes

After each meeting, **mentees** should take notes to summarize the key discussion points. This helps both parties stay aligned on progress and next steps. Notes should include:

- Key takeaways
- Next steps or action items
- Any unresolved questions or topics for future discussion

By completing this worksheet, you're laying the groundwork for a productive and successful mentorship relationship. Keep track of your progress, and don't forget to revisit your plan as your needs evolve.

Communication Guidelines

Mentor Name: _____ **Email:** _____

Phone: _____ **Address:** _____

City: _____ **State:** _____ **Zip Code:** _____

Mentee Name: _____ **Email:** _____

Phone: _____ **Address:** _____

City: _____ **State:** _____ **Zip Code:** _____

Preferred Method of Communication (Circle One): Email Phone Virtual In-Person

Availability: What days/times work best for you? Please consider time zones.
(Circle the ideal times for both mentee and mentor)

Monday AM Tuesday AM Wednesday AM Thursday AM Friday AM

Monday PM Tuesday PM Wednesday PM Thursday PM Friday PM

Meeting Location and Frequency

In this area, Discuss meeting logistics, including location, frequency, and duration. Options could include monthly one-hour virtual sessions, bi-weekly in-person lunches (if local), or connecting at events like Facility Fusion or World Workplace. Meeting logistics are subject to mentor/mentee availability and flexibility.

Notes: _____

First Meeting Next Steps and Takeaways

During your first meeting, jot down key takeaways, action items, and any unresolved topics to revisit. Use this as a foundation to track progress and refine your mentorship plan over time.

Notes: _____
