

## Getting Started With a New Mentor Checklist

### Step 1: Define Your Needs for Mentoring

- Determine your goals and mentoring needs.
- Identify your strengths and gaps as they relate to your goals.

### Step 2: Identify Potential Mentors

Keeping your specific mentoring needs in mind, search for an individual who has expertise in your gap areas.

- Conduct web and PubMed searches to identify experts.
- Ask colleagues for recommendations.
- Seek out speakers at conferences.
- Actively engage in networking.
- Connect with your local ACP chapter.

There may be several individuals who could provide mentoring support for your specific need, and you will want to meet with the individuals to determine whether there is a match.

### Step 3: Contact a Potential Mentor

Depending on the circumstances and if it is at all possible, connect with your potential mentor in person. However, reaching out via e-mail is also perfectly acceptable.

- Introduce yourself—include brief personal information, and share your CV.
- Be specific about your need for guidance. Define how the potential mentor can help you.
- Mention why you have specifically identified them as a potential mentor by identifying their relevant experience.

Approach this interaction with an inquisitive mindset—ask questions, listen, and also share highlights about yourself. You are setting the stage for the first meeting, which will also expand and deepen these foundational aspects of the purpose for the relationship. In approaching these individuals, keep the focus on a specific request.

### Step 4: Establish the Relationship

Prior to your first meeting with your mentor:

- Send the mentor your biographical sketch and/or CV.
- Obtain and review the mentor's biographical sketch and/or CV.
- Prepare to discuss your specific mentoring needs.
- Prepare to discuss your goals and expectations for the relationship.

Setting goals and expectations is a major task in building effective mentoring relationships. It is important to:

- Define the goals and objectives for the mentoring relationship.
- Agree on the steps and timeline to reach the goal.
- Discuss mutual expectations and boundaries.
- Negotiate a schedule for meeting together.

## Step 5: Nurture and Manage the Relationship

- **Manage up.** Managing up means consciously working to have a positive working relationship with your mentor. Take charge of meeting logistics, including responsibility for scheduling, setting the agenda, and clearly articulating what you need from the mentor.
- **Seek to understand your mentor's style.** Adjust your style to blend with that of your mentor. Learn your mentor's preferences in terms of meetings, communication style, and formality. Does your mentor prefer ...
  - a formal meeting or a more informal chat to brainstorm freely?
  - short (more frequent) or long (periodic) conversations?
  - lots of details and data or the big picture/bottom line?
  - E-mail communication or in-person discussion?
  - time to review documents ahead of time?

You can ask your mentor about their preferences, but it is just as important to listen, observe, and learn how they work.

- **Communicate effectively.** Engage in a positive and energetic way. Be an enthusiastic learner. Listening is more important than talking in the learning process.
- **Be open to feedback,** and be willing to be flexible in your approach and try something new. You do not have to accept every piece of advice that your mentor provides, but you should weigh the advice from your mentor with your own opinions and perhaps the advice from others before you make a decision. In the end, it is your decision how to proceed.
- **If you aren't receiving feedback, seek it.** Ask your mentor for feedback, and indicate your willingness to hear it.
- **Express gratitude.** Let your mentor know that you value their guidance and appreciate their service as a mentor.

From *Managing Up: The Key to Making the Most of Your Mentoring Relationships*  
Luanne E. Thorndyke, MD, FACP