



First Meeting Tool

Directions: Use this tool for the first meeting with your mentoring partner (for future meetings, use the Meeting Tool).

Mentee Details

First Name		Surname	
Email		Phone	

Mentor Details

First Name		Surname	
Email		Phone	

Mentee: Background (work, education, other):	
Mentor: Background (work, education, other):	

Mentee needs to discuss	
Mentee areas/strengths to leverage	
Mentee growth areas to improve	
Mentee knowledge, skills, attitude changes	
Resources required	
Immediate goals:	
Longer term goals:	
How we will manage the relationship. Expectations we have of each other include:	



How often, when and where we'll meet:	
Beyond face-to-face meetings, other ways we'll communicate with each other:	
Any limits or constraints on our interaction and how we'll handle those:	
How the mentee prefers to receive feedback from the mentor:	
Challenges we're likely to face and what we can do to prevent or manage these: (For example, discuss how you'll manage when either of you is travelling.)	
Other agreements:	
Mentee's greatest challenges: (Is it part of a bigger challenge? What will it take to overcome it? What options does the mentee have?)	
Specific assistance the mentor can provide (keep things general at this point):	
How we'll know we've been successful:	
Action items to complete before next meeting (including setting goals):	
Next meeting date, time and location:	