

INVEST IN HER FUTURE

MENTOR GUIDE

The mentorship program is officially a 3-6 month commitment but can be continued at the discretion of the mentor and mentee. Meetings are recommended to be held once a month either in-person, over the phone, or via videoconference, but can be tailored to the preferences of the mentor and mentee.

WHAT TO EXPECT

The mentorship program is:

- ✓ **A developmental tool**—Expands knowledge, networks, and prepares for future career growth
- ✓ **A knowledge sharing opportunity**—Provides awareness of opportunities and activities that can broaden education and skills
- ✓ **An organizational culture enhancer**—Helps mentees better understand the operations, policies, and culture in the workplace

The mentorship program is not:

- ✗ A guarantee of an employment offer or career enhancement
- ✗ Replacement for traditional career training (internship, co-op)
- ✗ Replacement for formal education

FIRST MEETING CHECKLIST

Be sure to establish rapport:

- Get to know your mentee—find out what their interests are outside of work; ask them about their education and career history
- Let your mentee get to know you on a more personal level by sharing your own career history, hobbies, and background
- Discuss your mentee's goals and expectations for the relationship and clarify the role you will have as their mentor

Create an action plan with your mentee:

- Discuss your mentee's strengths and short- and long-term developmental needs
- Discuss any items of interest, current challenges and recent successes of your mentee
- Agree on next steps and discuss when you should meet next; be sure to establish formal meeting schedules and preferred ways of communicating

Refer to the **Mentoring discussions guide** located on the next page for conversation starters and planning future meetings

YOUR ROLE INCLUDES:

- Actively working with your mentee to analyze skills, career options and goals
- Assisting in identifying and removing barriers to your mentee's development
- Serving as an informal, third-party sounding board for input and decisions
- Openly and honestly sharing "lessons learned" from your own experience
- Assisting mentee in networking, acquiring a broader understanding of the corporate environment

INVEST IN HER FUTURE

MENTOR GUIDE

MENTOR DISCUSSION GUIDE

Planning conversations can help ensure you make the most of your time together; Refer to the topics and questions below to help guide your mentoring discussions. Make sure to adjust topics and questions where you see fit to align them with your mentee's goals & expectations.

SKILL STRENGTHS AND GAPS

- What are your top five skills (i.e., those in which you have the most proficiency and/or those you enjoy using the most)?
- What do you believe are the top two or three skills you need to learn to grow in order to advance? How are you working on gaining/strengthening these skills?
- How will you know you have mastered or successfully enhanced a skill or competency?
- What impact do you believe new skill(s) will have on your future career progression? How will you apply this skill?

JOB SATISFACTION AND CAREER GOALS

- What are your professional interests and values? Are you motivated by compensation? By increased responsibility? By a sense of mission?
- What are your lifestyle needs? For example, you may prefer a set work schedule, limited or no travel, work-life balance, etc.
- What is your overall level of satisfaction with your major/minor? What made you choose Finance as a field?
- What type of academic experience did you enjoy the most during your school years? What new activities or projects would you like to try?
- How do you envision your first job out of school?

PROFESSIONAL DEVELOPMENT AND GOAL ACHIEVEMENT

- How do you define success?
- What would you like to be doing six to twelve months from now and/or after graduation?
- What do you need to do to get there? For example, what types of projects would you need to work on and what type of training and experience would you need?
- Are there any other big-picture personal development goals that you'd like to make me aware of?
- What resources are available to help you move forward?
- What is the first step you will take to achieve your preferred outcome? How can I help with this?