

Checklist for Mentees to “Manage Up” to create Successful Mentoring Relationships

Adapted from Zerzan et al., Acad Med. 2009; 84:140–144

Getting ready

- Clarify your values
- Identify your work style and habits
- Identify knowledge and skill gaps
 - Personal
 - Professional development
 - Skill development
 - Academic guidance
 - Research
- List specific opportunities sought — e.g. grant writing, presentation
- Write down goals: 3 months, 1 year, 5 year

Finding a mentor . . . or two

- Meet with people you know
- Get recommendations
- Ask people you meet with who else they recommend
- Be persistent
- Find multiple mentors, both junior and senior people

Things to look for in a mentor

- Is available and accessible
- Provides opportunities and encourages mentee to take risks
- Helps mentee develop own agenda
- Has prior mentoring experience

The first meeting

- Tell your mentor how he or she has already helped you
- Share your background, values, and needs
- Send a thank-you note after the meeting

Cultivating the mentor–mentee relationship

- Agree on structure and objectives of relationship
- Plan and set the meeting agendas
- Ask questions
- Actively listen
- Follow through on assigned tasks
- Ask for feedback
- Manage up
 - Set goals and expectations
 - Be responsive and flexible
 - Direct the flow of information
 - Follow a regular meeting schedule with agenda

Separation

- Talk about when the relationship should end
- Talk with your mentor about next steps
- Talk about future mentors