The Mentoring   
Process Workbook



UPDATED FOR 2022

A GUIDE TO GETTING STARTED FOR MENTORS AND MENTEES

|  |  |  |  |
| --- | --- | --- | --- |
| MENTOR’S NAME: | | |  |
| MENTEE’S NAME: | |  | |
| DATE STARTED: |  | | |

ANY ADDITIONAL PERSONAL INFORMATION ADDED TO THIS WORKBOOK BY THE MENTORSHIP PARTNERS IS

PRIVATE AND CONFIDENTIAL (SEE CONTRACT INSIDE)

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MENTEE PAGE

5 THINGS ABOUT ME

PERSONAL SWOT ASSESSMENT

**STRENGTHS**

**WEAKNESSES**

**OPPORTUNITIES**

**THREATS**

MENTEE PAGE

MY CURRENT GOALS

MY MENTORSHIP GOALS

MENTOR PAGE

5 THINGS ABOUT ME

PERSONAL SWOT ASSESSMENT

**STRENGTHS**

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MENTOR PAGE

MY CURRENT GOALS

MY MENTORSHIP GOALS

|  |  |  |
| --- | --- | --- |
| Name: |  | Name: |
|  |  |  |
| Date: |  | Confidentiality Agreed: |

**Confidentiality and Privacy:** The Mentorship between the individuals named above may contain confidential or personal and private information. During Mentorship, trust is implicit and required for successful outcomes. To provide explicit direction, we ask both parties to agree to the following:

**The Mentorship parties recognize that it may be necessary to disclose certain confidential information in the course of their discussions. This information may be disclosed verbally, in writing, or electronically. Information, such as personal or professional plans, business plans, strategies, and goals, are considered Confidential and should be treated as such by both parties. No confidential information shall be shared, in any form, with individuals or organizations outside of the Mentorship unless given express and written agreement by the information owner.**

MENTORSHIP WAY OF WORKING

|  |  |  |  |
| --- | --- | --- | --- |
| Meeting Approach | Calls/Video  WhatsApp checkins  Informal/Formal |  |  |
|  |
| Meeting Timing | Monthly,  Quarterly |  |  |
|  |
| Agenda | Time and time-  box meetings! |  |  |
|  |
| Action  List | Updated before  and after meetings |  |  |
|  |
| Dashboard  or Roadmap | Review timing |  |  |
|  |
| Tools to  use | Mentor form  Google  Trello  etc. |  |  |
|  |

Consolidate Shared Objectives

SHARED PAGE



MENTORSHIP GOALS – SHARED

GOAL

OUTCOME



MENTORSHIP EXPECTATIONS – SHARED

EXPECTATIONS

ACCOUNTABILITY

Brainstorm your Roadmap

What does success look like for the mentee and mentor? Create a roadmap for each role. Do they align? Are individual goals met?

Use this worksheet to talk through your individual and joint plan. Add the agreed summary plan to your meeting Dashboard.

NAME:

Timing Action Outcome



NAME:

Timing Action Outcome



Meeting Planner



|  |  |  |
| --- | --- | --- |
| NAME |  | NAME |
| MEETING NUMBER |  | MEETING DATE |

|  |
| --- |
| **Agenda:**  (goal updates, action reviews, etc) |

**Current Goal Status:**

Timing Action Outcome



|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Action Items:** |  | **Owner:** |  | **Due Date:** |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |

**Current Goal Evaluation Current Mentorship Evaluation**

Icon

Description automatically generatedIcon

Description automatically generated

|  |
| --- |
| **Plans for improvement:** |

Planning and Evaluation



|  |  |  |  |
| --- | --- | --- | --- |
|  | TOTAL NUMBER OF MEETINGS |  | TOTAL NUMBER OF HOURS SPENT  (INCLUDING INDIVIDUAL TIME AND MEETING TIME) |
|  |  |  |  |
|  | FINAL ASSESSMENT – MENTORING GOALS MET | | |
|  |  |  |  |
|  | KEY TAKE AWAYS FROM MENTORSHIP | | |
|  |  |  |  |
|  | MENTORSHIP LESSONS LEARNED | | |

**Final Assessment Goals Met Final Assessment Mentorship**



|  |  |  |  |
| --- | --- | --- | --- |
|  | WHAT’S NEXT – NEW GOALS | | |
|  |  |  |  |
|  | NETWORKING PLANS | | |
|  |  |  |  |
|  | CERTIFICATIONS PLANS | | |