

# WBS Mentor Checklist - Recommendations

## Connecting with your mentee:

1. Your mentee will be in touch within 7 days of the relationship connection email (sent to you both)
2. If you have not had an email within 7 days, please contact them, to arrange the first meeting
3. Then, if there is no contact within 14 days of the original connection email, inform WBS

## Introductory email:

- Agree type of online video platform (or audio) to virtually meet face-to-face for the first time
- Whilst a session is typically one hour, be prepared that the first sessions might be longer. Therefore, consider making the first meeting slightly longer, session than usual meeting.
- First meeting should take place within two weeks of induction.  
(NB. Although if holidays/study/work prevents this, let your mentor know that you can meet after xx)
- Consider asking for a copy of their CV or other background, to help build a professional picture.

## Before your first session

- Read their WBS Mentee profile, LinkedIn profile and CV if forwarded to you.
- Identify areas of mutual interest to help build rapport in your relationship
- Familiarise yourself with and use the Induction Day Support documents, as appropriate
- Also refresh your memory on the resources available to you; go to the [Mentor Online Area](#)
- Be prepared to use templates and frameworks provided by WBS:-
  1. Contracting/Boundaries Framework – remember you can adjust the labels to suit you both
  2. How you wish to converse? – be prepared to share how you like to work together
  3. Outcomes / Objectives – use this or as a guide, to help focus on what you want to achieve from each session (helpful for mentee or mentor)
  4. Mentoring session template – framework to record session details and actions

## First Session

- Take the lead and frame how mentoring sessions will work between you and your mentee both;
  - o how will you meet, when, how often, for how long
  - o who will set meeting, send agenda/discussion points and if so when?
  - o what happens if you have not received discussion points
  - o what happens if either party does not get a response from an email
  - o what happens if you need to postpone a meeting or study/life/work are too busy for sessions
  - o sending background material before a session
  - o what happens with actions points from sessions
  - o agree when you will review (we suggest every 6 months)
- Get to know your WBS Mentee. Finding common interests can help to build trust in the relationship
- Build in feedback into your sessions from the beginning, find out “What one, two or three things have you taken from today’s session?”
- To help you shape sessions and to understand what works for your mentee, find out what your mentee would like you to continue to do during a session and equally anything they would want less of?
- Book your next meeting / or even the next two-three meetings
- Request a (short) summary of meeting with your mentee after the session, containing what was agreed and any actions from your discussion.
- Set-up a means to record your session notes (privately/securely) the discussions, the outcomes, the actions and any background information.

**NB: Avoid – rushing to discuss issues during the first session. The first few sessions are primarily setting up how you will work and developing trust by getting to know one another.**