



Learn from a Mentor

Mentoring Experience Toolkit

Bridge

Leadership growth at your fingertips





Introduction

**A mentorship can provide the spark
that ignites your growth potential.**

Before you get started, be sure to save this document to your computer and save your responses as you go.



What is a mentor?

A mentor is a trusted guide or counselor. A mentor and mentee engage in a learning relationship where they work together to develop the mentee's skills, abilities, knowledge and thinking.



About this toolkit

This is a self-guided experience.

- > The toolkit guides you through the steps of finding and working with a mentor over 6 to 12 months.
- > It's on you! We provide the steps to take, and you complete them on your own pace.
- > Some steps are **activities**, such as reflective exercises you can complete on your own right here in this toolkit.
- > Other steps are **meetings** with your mentor, and we've provided sample agendas.
- > If you would like to opt into text message reminders to help nudge you along the steps, text **mentor** to **797979**



Recommended learning plan

To get the most out of this experience, we recommend completing these first.

1. [Care Delivery Leadership Foundations](#)
2. [High-Performing Teams](#)
3. [Build Your Network](#)

Are you ready for a mentorship?

Before you dive in, ask yourself:

- > Are you filling the responsibilities of your role and ready to push further?
- > Are you entering a new professional role – or do you aspire to?
- > Do you think you would benefit from talking to an experienced professional?
- > Do you ever wish you could bounce ideas off someone?
- > Are you seeking expertise in a new area?
- > Do you ever feel like you can't talk with your professional peers?
- > Do you have some goals that you'd like to work on?

Contents

1. An **introduction** to what a mentorship offers
2. How to **find a mentor**
3. How to **build your relationship** over 6 to 12 months

“

Mentors don't necessarily have the answers, but they can help you find your own answers.

Amelia Rope

What are the benefits of mentorship?

You as the mentee

- > Learn from the wisdom and experiences of someone who has traveled the path before you
- > Build and strengthen internal networks
- > Expand your perspective through cross-functional learning and a broader organizational or industry view
- > Hear impartial feedback, advice and encouragement
- > Develop a sharper focus on what is needed to grow professionally within the organization
- > Gain knowledge about the organization's culture and unspoken rules that can be critical for success

Your mentor

- > Contributes to the development of less experienced leaders
- > Gets the opportunity to role model and demonstrate leadership
- > Gains new insights into organizational issues
- > Gains or enhances critical leadership skills, such as listening, feedback and coaching
- > Expands professional relationships
- > Learns from you as the mentee through “reverse mentoring”

Optum

- > Facilitates the growth and development of high-potential leaders
- > Demonstrates visible commitment to teammate development and continuous learning
- > Transfers and maintains institutional knowledge
- > Fosters an inclusive, diverse and collaborative environment
- > Encourages an environment where people motivate each other and work together to improve skills and knowledge
- > Breaks down the “silo” mentality that hinders cooperation among functions

Introduction

What advice can a mentor provide?

Mentors can advise you in areas such as:

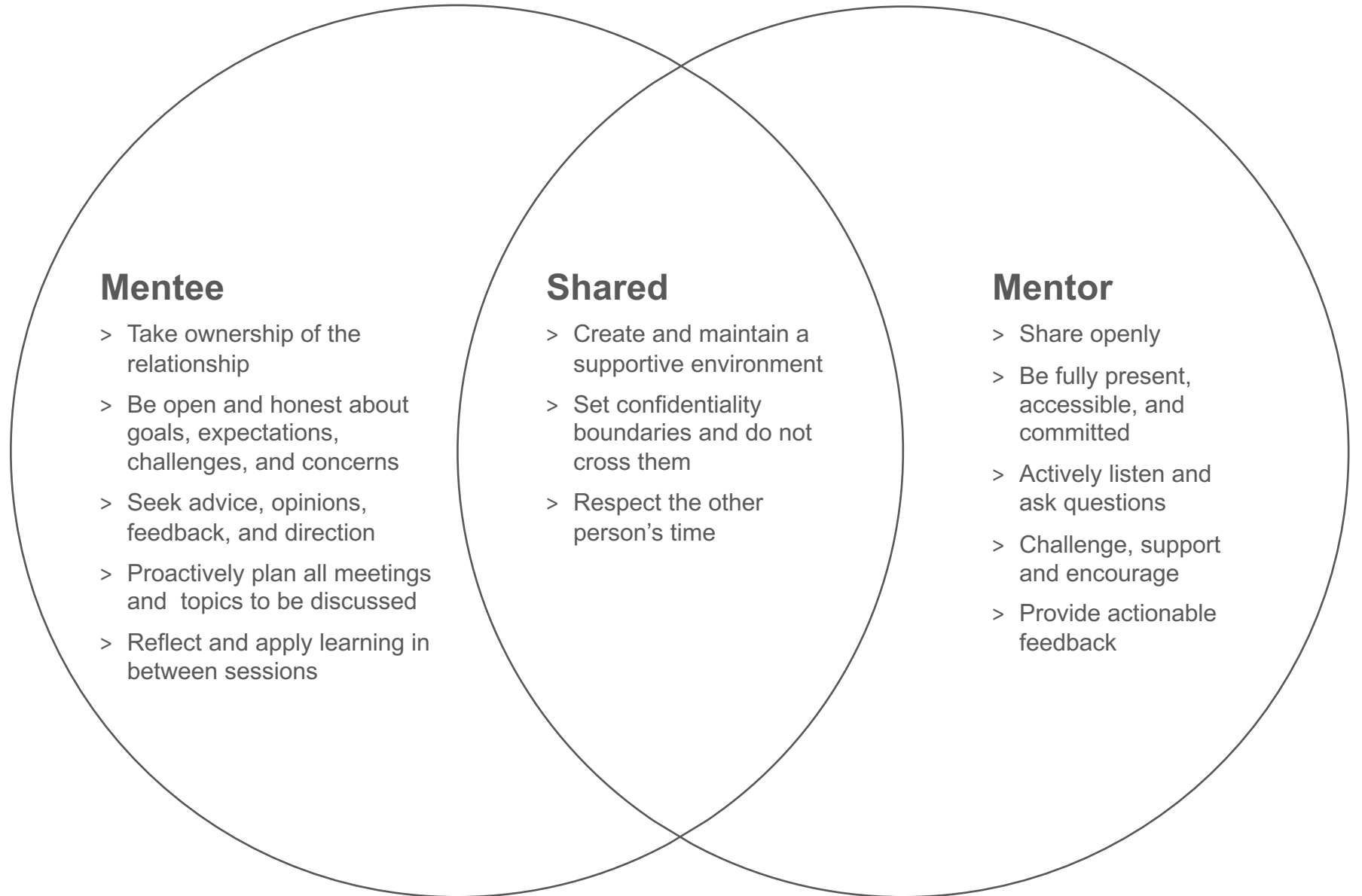
- ✓ Managing time, priorities and workload
- ✓ Managing relationships
- ✓ Career progression
- ✓ Interpreting and converting feedback into action
- ✓ Coaching and developing others
- ✓ Identifying developmental opportunities
- ✓ Building business acumen
- ✓ Providing insights into organizational culture
- ✓ Building influence in the organization
- ✓ Building technical or functional skills
- ✓ Deepening industry, company or functional knowledge
- ✓ Developing strategy or plans
- ✓ Dealing with and leading change
- ✓ Effective communication
- ✓ Building and leading high-performing teams
- ✓ Navigating the organization
- ✓ Developing or refining leadership style or philosophy

How would this differ from your relationship with your manager?

Keep in mind that while a mentor can be a sounding board for career advice, your manager should support you in identifying work priorities and helping you set yourself up for success in your role.

Introduction

Responsibilities

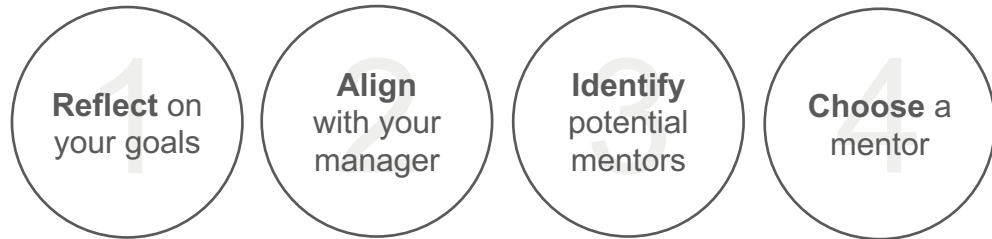


Introduction

Mentorship journey

Now that you know what mentoring means and what it can do for you, are you ready to find a mentor? In this toolkit, you'll find tools to help you navigate each step of the journey.

Find a mentor



Build your relationship



1. Reflect

Activity | 20 minutes

This step is all about you! In order to find the right mentor, you need to know what you're seeking from the relationship.

Set a timer for 20 minutes. Then think through these four questions to bring clarity to your goals.

> **If you get stuck** identifying goals, the Common Language of Leadership (CLL) can help you identify development areas.

- **Integrated teammates**
Visit the [CLL site](#).
- **Non-integrated teammates**
See the [CLL job aid \(non-integrated\)](#).

1. What **short-term goals** do you have in your current role?

2. What **long-term goals** do you have? How do you want to grow your career?

3. What are some **potential barriers** to achieving your goals and how might you overcome these barriers?

4. Why seek a mentor relationship **at this time**? How would this fit into your schedule?

2. Align

Meeting | 20 minutes

Now it's time to have a conversation with your manager or a colleague you trust so that they may offer support as you continue down the mentorship journey.

Tip: Prior to the discussion, you might want to take a sneak peek at step 3 on the next page to start thinking about potential mentors.

Sample questions for your manager or a trusted colleague.

Share your reflections from the previous page, and seek their support by asking questions such as:

1. What feedback do you have on my goals?
2. What other priorities do you feel are important for me to focus on?
3. Do you know anyone who might be a good mentor for me in these areas?
4. As I move forward with this experience, what else would you have me consider?
5. How would you like to stay informed of my progress?
6. Add your own questions!

As you continue the Learn from a Mentor experience, update your manager or trusted colleague on your progress every so often.

3. Identify

Activity | 25 minutes

It's time to get curious about your network.

Set a timer for 25 minutes. Answer these questions to identify which of your connections might be a good potential mentor for you. Consider untapped connections too!

Aim to identify a mentor who is no more than one or two levels above you in the organizational hierarchy.

1. **Reflect on the “like me” bias.** Leaders have the power to cultivate a culture that questions bias, embraces diversity and improves healthy equity.

Before you begin identifying possible mentors, consider your approach.

Individuals tend to gravitate towards those who are like themselves (i.e., race, age, economic background, sexual orientation, education, gender identity, etc.).

What impact will thinking beyond the “like me” bias have on your mentorship experience?
What actions can you take to identify diverse mentors?

3. Identify *Continued*

Activity | 25 minutes

> **If you get stuck** identifying connections, consider asking your manager or a colleague for ideas or check out the [Build Your Network](#) experience before you move on.

2. **Decide what matters to you.** What kind of person do you look up to? What characteristics and skills do you admire? Who do you know that embodies these?

3. **Think practically.** What experience, expertise and knowledge are you seeking in a mentor? Who in your network has these?

4. **Narrow down a few options.** Who do you see yourself working well with? Who can guide you towards your goals? Might this person have the time for a mentoring partnership? If you haven't already, challenge yourself to think beyond those who are "like me".

4. Choose

Activity | 30 minutes

Now that you know what you're looking for, you're ready to reach out to your potential mentor to determine if the mentoring relationship might be a good fit.

Here are some sample emails you can use to start the conversation.

- > **Example 1:** For someone you already know or have interacted with in the past.
- > **Example 2:** For a referral, someone you have not spoken with or written to in the past.

...

1

Hi **[potential mentor]**,

As you may be aware, I've reached a stage in my career where I want to **[specialize in XYZ / move into management / take my skills to the next level]**.

I've always admired the way you handle yourself as a professional and deeply respect your **[incredible knowledge of XYZ / management style]**, and so I was wondering whether you'd be open to mentoring me.

I'd love to **[summary of what you'd like out of the mentorship, e.g. catch up with you once a month to get feedback on XYZ / shadow you once a week during XYZ task / assist you with XYZ project]**.

I understand that this isn't a small request as schedules are packed but I'm looking forward to exploring this possibility with you.

Let me know your thoughts on the matter and we can go from there.

Looking forward to hearing from you.

[insert signature]

...

2

Dear **[potential mentor]**,

My name is **[your name]** and I currently work in the **XYZ** department. I'm new to this field and have great respect for the work you have done, particularly in **XYZ**. I would like to hear your career story and ask a few questions about your career path. Could I ask for 30 minutes of your time over coffee or lunch to meet?

I understand you are very busy and if 30 minutes is not possible perhaps a 15-minute phone conversation is more manageable.

Please let me know a date and time that works best with your schedule.

Alternatively, is there someone else you'd recommend I connect with?

Thank you for your time and I look forward to hearing from you.

Best,

[insert signature]

4. Choose *Continued*

Activity | 30 minutes

Here are some questions you can use to help you evaluate the fit with your potential mentor.

> **Need a separate copy?** Download the [potential mentor questionnaire](#) (*Microsoft Word document*).

Potential mentor questionnaire

1. Tell me about your professional experiences thus far.
 2. Why are you choosing to mentor?
 3. If you've mentored in the past, what strengths did you discover and what barriers did you face?
 4. What expectations would you have of me as your mentee?
 5. What questions can I answer for you, about me, the work I do, what goals I have, and the like?
 6. Add your own questions!
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Repeat this step until you've find a mentor who you've deemed a good fit and up for the challenge.

Build your relationship

As the mentee, you are in the driver's seat.

Now is where the rubber meets the road – You get to collaborate with your mentor to start to make some progress towards your goals.

To keep this mentorship on track, as the mentee, you will:

- > Take responsibility for scheduling meetings.
- > Establish meeting agendas (Samples are provided on the next few pages).
- > Capture next steps and tasks to be completed.
- > Follow up on commitments.

5. Start

Meeting | 30 minutes

Get to know each other! Use this **meet and greet guide** for your first meeting with your mentor. Be sure to capture next steps and tasks to be completed.

Following your conversation, both you and your mentor should sign the [mentorship agreement](#) to capture your commitments in writing.

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- > **Need a separate copy?** Download the [meet and greet guide](#) (*Microsoft Word document*).

Meet and greet guide

Topic	Discussion
Introductions 5 minutes	<ul style="list-style-type: none">> Share your professional experiences, academic background, and any personal interests, and ask your mentor to share too.
Establish your meeting timeline and schedule 10 minutes	<ul style="list-style-type: none">> Discuss times, dates, and places for meetings.> Ask about your mentor's availability and preferences for between-meeting contact (email, office visits, etc.)> Set standard for rescheduling/cancellation.> Determine how long you'd both like the mentorship to last<ul style="list-style-type: none">– Consider meeting two times per month over a 6-, 9-, or 12-month period– Each meeting should last between 30-60 minutes
Discuss goals 10 minutes	<ul style="list-style-type: none">> Refer back to your reflections in step 1 of this toolkit ("Reflect"). At a high level, what are you seeking to work on?> Why now?> What barriers are coming to mind?> How might you get started on these goals?
Wrap up 5 minutes	<ul style="list-style-type: none">> Express appreciation! Thank your mentor for his or her time and effort.> Let your mentor know you'll be sending a mentorship agreement outlining the commitments you've discussed and ask them to sign.> Recap what you'll be doing to follow up, and what you'll be discussing at your next meeting.

6. Explore

Meeting | 30-60 minutes

In your second meeting, build on your early conversations with your mentor by taking these steps.

- > Continue to build trust by being present, asking impactful questions, and getting curious about your mentor.
- > Dive deeper into goal planning. Work with your mentor to create measurable SMART goals that you can work towards during your time together.

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- > **Need a separate copy?** Download the [SMART goals worksheet](#) (Microsoft Word document).

SMART goals will help keep you on track with what you want to achieve through your mentorship.

S

Specific

Includes who, what, where, when, and why of the achievement

M

Measurable

Defines milestones, key metrics and clear measures of success

A

Attainable

Provides a stretch opportunity to grow and is reasonable for the teammate to achieve

R

Relevant

Focuses on results, aligns to business priorities and produces tangible results

T

Time-bound

Includes a due date to give a sense of focus and urgency to the work

Goal

Define success

Target date

7. Work

Meetings | 30-60 minutes each

As you continue to meet with your mentor for the remainder of the mentorship and work towards goals, here is a sample meeting agenda.

> **Need a separate copy?** Download the [sample meeting agenda](#) (Microsoft Word document).

Sample meeting agenda

Topic	Discussion
Frame the meeting	<ul style="list-style-type: none">> At the start of the meeting, state the:<ul style="list-style-type: none">– Purpose of the meeting– How much time you have together– Agenda of what you plan to achieve
Progress	<ul style="list-style-type: none">> Continue to check in on progress and review and iterate on your SMART goals on the previous page. What progress are you seeing for yourself?
Support	<ul style="list-style-type: none">> Discuss where you might need guidance, support, tools, and resources.> Ask your mentor to be your accountability partner and be specific where you'd like to be held accountable.
Feedback	<ul style="list-style-type: none">> Discuss how you are seeking feedback on the goals you're working on.> Ask your mentor for feedback.
Outcomes	<ul style="list-style-type: none">> As you close each meeting, agree on any next steps for you and your mentor.

8. Close

Activity | 30-60 minutes

After 6 to 12 months, you're ready to bring the mentorship to a close. In your final meeting with your mentor:

- > Be gracious! Thank you always goes a long way.
- > Decide how you'll celebrate your journey and express your gratitude. See the next page for a few ideas.
- > Discuss how you might stay in contact with each other. How might you meet again in the future?

As your mentorship comes to an end, make some time for yourself to answer these reflection questions.

1. How has your mentoring partnership contributed to your overall professional growth?

2. What have you learned about yourself throughout this process?

3. If you were to engage in another mentorship, what would you keep the same? What would you do differently?

9. Celebrate!

Activity | 30-60 minutes

You've made it! Pick an activity to celebrate your accomplishments and thank your mentor for helping you get here.

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- > **UnitedHealth Group integrated teammates:** Consider recognizing your mentor through [Bravo!](#), UnitedHealth Group's employee recognition program.

To recognize your own accomplishments and show your gratitude for your mentor, you may choose to do one of the following.



Offer a *LinkedIn* recommendation or post a photo of you your mentor, expressing your gratitude. Share how your mentor helped you.



Write a final *thank you note* to your mentor. Consider a handwritten note that they can display in their office.



Get together for *lunch or coffee* to connect, share, and express your appreciation.



Ask your mentor how they would like to be celebrated!

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“A mentor is someone who allows you to see the hope inside yourself.”

Oprah Winfrey



Next steps

- > Explore the [Bridge](#) website to identify the next step in your development journey.
- > *Pass it on!* Share the [Learn from a Mentor](#) experience with someone you know who could benefit from a mentorship.

Thank you for committing
to **Learn from a Mentor.**

Share your reflections on this experience with txdfedback@optum.com

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