



MENTORSHIP PROGRAM ENGAGE EMERGING LEADERS



OUR GOAL

The goal of the mentorship program is to create one-on-one or small group connections to enrich and cultivate relationships in the insurance industry.



MENTORS

Will share their expertise and time to empower and help a mentee set and navigate a goal



MENTEES

Mentees should be ready to share goals, setbacks, and opportunities. They must be coachable and ready to navigate a new phase in their career.



Together, participants walk away committed to the industry and with a relationship to help them continue to thrive in their careers.



ARE YOU READY TO BE A MENTOR?

TIME & CONSISTENCY

Whether it's someone in your agency or a connection through the association or online, mentorship takes time and consistency. Are you ready?

LISTEN

Be ready to listen and get to know your mentee.

EXPERIENCES

Share your experiences and stories from your life with the mentee. Be relatable.

ESTABLISH GOALS

Help the mentee determine goals and help them create a roadmap to success. Goals should be: Specific, Measurable, Achievable, Relevant, Time-bound.

EMPOWER INDEPENDENCE

Provide action steps, research, or thought work between meetings. Help them reach new levels and build confidence.

ACCOUNTABILITY

Check in often, be available, and inspire commitment to furthering the career of your mentee

TRUSTED

Ensure your discussions are kept strictly between you and your mentee.

LEARN TOGETHER

Consider books, articles, podcasts, webinars, and TedTalks you want to share and can learn from together



ARE YOU READY TO BE A MENTEE?

ARE YOU READY TO DEVOTE THE TIME, THOUGHT, AND ENERGY TO TAKING THE NEXT STEP IN YOUR CAREER? COMMITTING TO A MENTORSHIP HELPS YOU CREATE A PERSONALIZED PATH TO SUCCESS WITH A TRUSTED ADVISOR IN YOUR AGENCY OR WITH SOMEONE YOU'VE MET IN THE INSURANCE INDUSTRY.

CANDID

Are you ready? Be open and honest about where you are in your career, what you do well, and where your opportunities can be found.

COACHABLE

Your mentor will share experiences. Enjoy their stories and be open to their tenured guidance.

GOAL ORIENTED

Be ready to establish measurable goals then commit the time and energy to taking those next steps.

ACCOUNTABLE

Complete your tasks, research and thought work on time.

DOCUMENTED

Create a shared document on Google drive to document notes, next steps and follow-up.

TRUSTED

Your conversations are confidential.

SHARED LEARNING

Consider books, articles, podcasts, webinars, and TedTalks you want to share and can learn from together.

FIRST MEETING IT'S TIME TO WORK TOGETHER



DO YOUR RESEARCH



Review survey questionnaire and familiarize yourself with your partners LinkedIn, bio, and experiences.

ASK QUESTIONS



Get to know each other. Share work history. What do you have in common? Where do your differences lie?

PREPARE INTRODUCTIONS



Talk about your experience, career, and what you are looking for out of this relationship.

TALK ACHIEVABLE GOALS



What are some of your high-level career goals? Do you have thoughts on strategic goals?

SET YOUR SCHEDULE

We will meet __ a month on X day
Mentee will dedicate __ hours each week to growth development

MENTEE TIPS FOR SUCCESS

Listen First

Have an open mind and allow yourself time to listen and reflect on the conversation.

Be Open

Be open to new challenges and feedback from the mentor.

Share Notes

Mentee should take notes, document deadlines, and confirm next steps after each meeting.

Devote the Time

Be ready to spend time on the calls and after to complete tasks and growth work.

SAMPLE FOUNDATIONAL MEETING AGENDA

TAKE 1 OR 2 MEETINGS TO SET THE FRAMEWORK FOR DEVELOPING GOALS AND SUCCESS MEASURES.



BRAINSTORMING GOALS, BRAIN DUMP EXERCISE (on own and then review)



GOAL Prioritization



CREATE Your Personal Vision Statement



HOW Tos and Success Measures



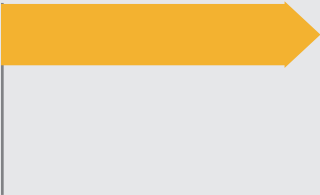
ESTABLISH New Habits



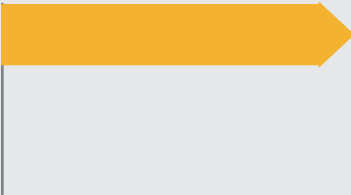
QUICK WINS (tasks that take 30 mins or less but need to be made a priority)

SAMPLE AGENDA FOR RECURRING MEETINGS

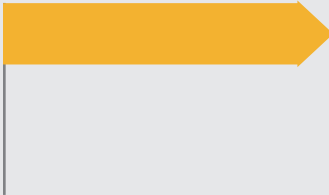
- **GROWTH CHART**



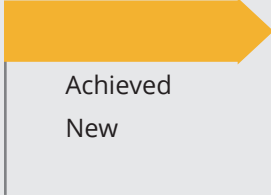
- **PERSONAL MISSION STATEMENT**



- **GOAL OVERVIEW**



- **QUICK WINS**



- **HABIT SETTING**



- **PROGRESS**



- **SETBACKS**



- **GROWTH STRATEGIES**





BRAIN DUMP

Spend 3-5 minutes quickly jotting down professional, personal, and business goals. These can be long-term or tasks. Stay present and let the ideas flow to paper.

THOUGHTS

IDEAS

GOALS

TO DOS

SORT YOUR GOALS INTO BUCKETS

GOAL STATEMENT

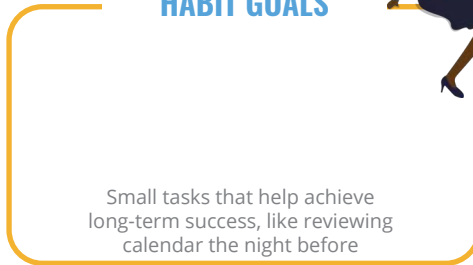
Create a Personal Vision Statement: much like a business vision, your personal vision helps you take ownership of your aspirations and keeps your goals front and center.

SHORT-TERM GOALS



HABIT GOALS

Small tasks that help achieve long-term success, like reviewing calendar the night before



LONG-TERM GOALS



QUICK WINS

Quick tasks that just need to be prioritized



SMART GOALS



SPECIFIC



MEASURABLE



ACHIEVABLE



RELEVANT



TIME-BOUND

GOAL BUILDER

Now, let's break down your SMART goals into phases.
How do you get there?

PERSONAL VISION STATEMENT

GOAL ONE

HOW IS IT...

Specific:

Measurable:

Achievable:

Relevant:

Timebound:

WHAT'S PHASE ONE

How Will You Make It Happen?

What's the Timeline?

What Does Success Look Like?

WHAT'S PHASE TWO

How Will You Make It Happen?

What's the Timeline?

What Does Success Look Like?

WHAT'S PHASE THREE

How Will You Make It Happen?

What's the Timeline?

What Does Success Look Like?

DECIDE ON A NEW DAILY HABIT

Fill the bubble for each day you meet that goal. For example, send one thank you video a day.

WEEK ONE

WEEK TWO

WEEK THREE

WEEK FOUR

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30 DAY HABIT TRACKER