

## Making the Most of Mentors: A Guide for Mentees

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### Abstract

Effective mentorship is likely one of the most important determinants of success in academic medicine and research. Many papers focus on mentoring from the mentor's perspective, but few give guidance to mentees forging these critically important relationships. The authors apply "managing up," a corporate concept, to academic medical

settings both to promote effective, successful mentoring and to make a mentor's job easier. Managing up requires the mentee to take responsibility for his or her part in the collaborative alliance and to be the leader of the relationship by guiding and facilitating the mentor's efforts to create a satisfying and productive relationship for both

parties. The authors review the initiation and cultivation of a mentoring relationship from the perspective of a mentee at any stage (student through junior faculty), and they propose specific strategies for mentee success.

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**M**entoring, a lifelong process particularly important for career development in academic medicine, is essential for a mentee to develop confidence in his or her work. It facilitates career selection, career advancement, publication productivity, and achievement of grant funding.<sup>1–3</sup> Mentoring is a symbiotic relationship aimed at advancing careers and career satisfaction for both the mentor and the mentee.<sup>4,5</sup> Ideally, it is a dynamic, collaborative, reciprocal relationship focused on a mentee's personal and professional development.<sup>6</sup> Mentoring can develop either spontaneously, based

on mutual interests, or be set up institutionally.<sup>7,8</sup> Mentees benefit from multiple mentors to gain exposure to a variety of styles, opinions, and experiences. Previous research has focused primarily on the importance of mentoring and mentors' activities.<sup>1,2,9</sup> We focus on the active role a mentee (at any level: student, resident, fellow, or junior faculty) might take to promote success in a mentoring relationship. In addition, we discuss common pitfalls and how to avoid them.

One classic definition of *mentor* is someone of advanced rank or experience who guides, teaches, and develops a novice.<sup>9</sup> Mentors in academic medicine can help with day-to-day tasks, such as manuscript editing, or they can help guide more substantial decisions, such as career planning. Some mentors are on-site; others are at a distance.<sup>9</sup> Mentors are peers, near their mentee's level of training; sounding boards who listen to their mentees process a decision; or role models who provide inspiration. They provide emotional and career support, facilitate insight and change, and/or help mentees avoid burnout. Good mentors value mentoring as part of their professional role and avoid focusing on their own professional needs and agendas, instead helping mentees develop theirs.<sup>10–12</sup> Good mentors take an interest in the mentee, provide both professional and personal support, prompt a mentee to take risks, and help open doors to opportunities.<sup>5,10</sup> Because all mentors have different strengths and may not perform all these roles and embody all

these qualities, establishing a complement of multiple mentors capable of making diverse contributions is useful for mentees. Whereas mentees benefit through their personal and professional development, mentors benefit by gaining professional stimulation, personal enrichment, satisfaction, and a sense of giving back to their profession.<sup>8,13</sup>

The mentee is not an empty vessel receiving the mentor's advice and wisdom but, rather, an active participant, shaping the relationship. The ideal mentee aspires to self-assessment, receptivity, initiative, responsibility, honesty, and appreciation for his or her mentor.<sup>4,14</sup> One particularly effective way for mentees to get the most out of a mentoring relationship is "managing up." Managing up is a common corporate concept for an employee/supervisor relationship that we believe to be highly applicable to mentoring relationships in academic medicine. The principal concept is that the *mentee* takes ownership of and directs the relationship, letting the mentor know what he or she needs and communicating the way his or her mentor prefers. Ideally, a motivated mentee manages the work of the relationship by planning and setting the meeting agenda, asking questions, listening, completing assigned tasks, and requesting feedback.<sup>4,5</sup> Managing up makes it easier for a mentor to help a mentee, which makes the relationship more satisfying and more successful for both.

We focus on initiating and cultivating a mentoring relationship, assigned or chosen, from the mentee's perspective. We propose

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using the strategy of managing up to guide the mentee's actions during these stages (List 1).<sup>6</sup>

## Initiation

### Preparing self

Before a mentee seeks a mentor, a few introspective steps are necessary.<sup>4,15</sup> First, a mentee must clarify his or her own values: What motivates him? What values and attributes does she respect in relationships? Are there personal preferences such as gender or race congruence, personality, emotional needs, or work habits important to the mentee? Next, a mentee should consider his or her personal work style and how it fits with mentoring approaches. Remembering their work styles in past academic environments, mentees might ask the following questions: "How do I learn best—by reading or listening?"<sup>15</sup> "Do I need structured, directive guidance, or do I prefer gentle supervision?" Finally, mentees must clarify their needs. What are their knowledge and skill gaps? Specifically, what domains do they want to gain or cultivate from the relationship: *personal* (creating work–life balance, building confidence), *professional development* (networking, establishing goals, choosing fellowships or jobs), *skill development* (communicating, managing time, increasing clinical skills), *academic guidance* (learning administrative skills, understanding department values, developing collegial relationships), or *research* (collaborating, developing methodology, drafting manuscripts, and writing grants)?<sup>5,7,16</sup>

Once a mentee has thought about his or her values, work style, and needs, the mentee should develop a clear vision of career goals using these values and needs. Creating specific, written goals for three months, one year, and five years is helpful.<sup>17</sup> If a mentee does not know what he or she wants to be doing in a year, establishing a possible direction provides a starting point. Goals should relate to the knowledge and skill gaps identified, but otherwise they can be specific (e.g., publish a paper) or broad (e.g., improve clinical exam skills), medically related, work related, or personal.<sup>11</sup> Setting goals helps a mentee present his or her needs to potential mentors. A mentee who clearly assesses skill and knowledge deficits and sets goals can effectively seek mentoring and become

## List 1

### Checklist for Mentees to "Manage Up" to Create Successful Mentoring Relationships

#### 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

responsible for his or her own growth.<sup>9</sup> It is important to refine and rewrite goals periodically.<sup>17</sup>

#### Finding a mentor . . . or two . . .

Finding a mentor may be the most difficult step in establishing a mentoring

relationship. Institutions may assign mentors, but often multiple mentors are helpful for specific needs, so a mentee may need to look for other mentors beyond those officially assigned. There are several ways to approach the process. Mentees may start by meeting with

faculty they already know both inside and outside their department, school, and/or hospital in order to talk about what guidance and support they seek and to get recommendations of potential mentors who might be a “good fit.”<sup>10</sup> In these meetings, a mentee should ask about potential mentors’ reputations and experiences mentoring successful mentees. Another strategy for identifying mentors suggests the mentee consider people who have positively impacted him or her. The official mentoring relationship can start positively if it is based on previously established admiration, trust, and compatible background and interests. Once the mentee has a list of recommendations, he or she should meet with the selected faculty and conduct informational interviews seeking compatible interests and work styles. Finally, during these meetings, mentees should ask who else the mentor might recommend to advise them, and in this way the initial list grows into a network of contacts.

One common difficulty during the initiation stage is a perception by the mentee that people are too busy or unavailable to be mentors. Knowing that mentoring is time- and energy-intensive and that a potential mentor may say no, a mentee may be uncomfortable requesting mentorship and fear rejection. One remedy for these difficulties is persistence in approaching potential mentors. Additionally, a mentee should be clear in expressing needs, thus providing potential mentors a sense of the commitment sought. When people are too busy or overcommitted, they can gracefully decline and suggest others for the mentee to approach. Another impediment to approaching mentors, even after considering needs and listing potential mentors, is that a mentee may be indecisive regarding his or her career and, therefore, have difficulty knowing whom to approach.<sup>16</sup> If a mentee does not yet have a clear career direction, he or she can seek out mentors who are good at guiding exploration of career options.

Mentees should begin seeking mentoring early and in multiple places. A mentee benefits from cultivating mentors at both junior and senior levels. Junior-level mentors complement senior faculty mentors because they may have more time and are closer to the mentee’s career stage. Senior mentors are helpful in

connecting a mentee to other prominent scholars, providing research datasets, and giving long-term career planning advice. Multiple mentors are necessary to get needed guidance across the spectrum of work and personal goals.<sup>5,10</sup> Also, identifying and cultivating multiple mentors is advantageous for the mentee because providing mentorship becomes less demanding and time consuming, and the mentor can keep focused on what he or she knows and does best. Strategies for making multiple mentors successful include clear roles and expectations for each mentor, a good relationship among mentors, and mentors with complementary experience.<sup>18</sup> Potential problems arise when there are unclear expectations, disagreement, or competition among mentors. A risk of multiple mentors is erosion of a close mentoring relationship because the dyad spends less time together. Cultivating the relationship and managing up, discussed in the next section, will help address these problems.

#### Meeting for the first time

When a mentee first meets with a prospective mentor, whether chosen or assigned, the mentee must have a plan.<sup>19</sup> Mentees should consider how to market themselves; with busy and overcommitted mentors, it helps if a mentee can recruit a mentor. In fact, it may be best to schedule a brief meeting when considering a potential mentor, and only after the mentee has engaged the potential mentor and demonstrated organization and ability should he or she formally ask whether a person will mentor. The meeting may start with both individuals sharing their backgrounds, followed by the mentee clearly articulating his or her needs and values.<sup>20</sup> A mentee demonstrates early success to prospective mentors by having predefined goals and needs. Other tips for the initial meeting include telling the mentor how he or she has already been helpful, asking for feedback about a research idea, or specifically discussing how the mentor may be helpful. A mentee should ask the mentor’s permission to contact him or her for future guidance and explicitly state the likely purpose. Finally, a mentee must be accountable to his or her prospective mentor and should follow up with a thank-you note or e-mail summarizing the discussion and the mentee’s plans to proceed, thereby keeping the mentor engaged.

At the next meeting, the mentee can ask for more advice. Finding a suitable mentor requires effort and persistence, allowing brief interactions to grow into learning partnerships and long-term alliances.<sup>9,10</sup>

#### Cultivation

Once a mentee has engaged a mentor, the relationship needs cultivation. At this stage, the mentoring dyad agrees on both objectives and a relationship structure such as meeting frequency (e.g., often an hour every two to four weeks), key responsibilities and needs of each party (such as the mentor’s availability outside of meetings, and networking opportunities for the mentee), mutual expectations and goals (e.g., the mentor will review writing; the mentee will ask for feedback), and concrete measures of progress and success (e.g., the mentee will eventually present an abstract at a meeting). It is important for each individual to make the relationship a priority, set aside time for the relationship, and agree on confidentiality.<sup>4</sup>

#### Managing up

Managing up is one way of cultivating the mentoring relationship.<sup>15</sup> Managing up means the mentee takes ownership of the relationship, letting the mentor know what he or she needs and organizing information in the form the mentor prefers. A mentee must express his or her needs in a direct manner and take responsibility for setting and sticking to a goal schedule. Managing up makes it easier for mentors to help a mentee, and it makes the relationship more satisfying and more successful for both parties because the mentor can target help and the mentee gets exactly what he or she needs most. A mentee must ask directly how the mentor will judge success and be responsive to the mentor’s suggestions and tasks. A mentee should be available and flexible if a mentor’s time or schedule changes. A mentee must communicate in a straightforward way by addressing issues of potential conflict (e.g., authorship on a paper) as they arise and asking when he or she does not understand something.

A mentee’s understanding of him- or herself and the mentor is key to making the relationship successful. The mentee must know the work styles and personal styles, strengths and weaknesses, blind spots, and trigger points of both

participants.<sup>4,21</sup> A mentee will observe these over time, but he or she may also ask about them, either directly or through other peers and supervisors. A mentee can use the information gleaned from his or her own self-assessment to develop and manage a healthy working relationship compatible with each person's work style and expectations and, most importantly, in a way that meets his or her critical needs.<sup>21</sup>

Managing up requires the mentee to take responsibility for managing information flow.<sup>15</sup> A mentee should ask directly about the mentor's preferred communication style—Does the mentor like to know the detailed facts and figures, or is a broad overview with specific problems better? Does the mentor like to communicate by e-mail, phone, or both? Is the mentor a “listener” or a “reader”?<sup>21</sup> If the mentor is a listener, the mentee should provide a verbal brief first and follow up with a short written summary of the details. If the mentor is a reader, than the mentee should provide written material in advance and follow up by talking about the issues in person at the arranged meeting. It is essential to communicate frequently and effectively according to the mentor's preferred format and frequency of information exchange.<sup>4</sup>

A mentee needs to ask questions to get new insight, verify or clarify ideas, show interest, and listen actively. Although a mentee should put forth his or her own ideas, it is critical that he or she not get defensive or argumentative when the mentor disagrees or provides constructive feedback. The relationship's ultimate goal is to help the mentee succeed, and the mentor has the mentee's best interests in mind. If a mentee disagrees with a mentor, he or she should try to understand the mentor's perspective but discuss both opinions because, although the mentor has more experience than the mentee, the mentee brings a new and potentially valuable view to a situation.<sup>4,12</sup> If a mentee must disagree, he or she should do so respectfully and start by asking clarifying questions to find out more about the basis for the mentor's suggestions. When mentees learn from disagreements, they grow.

Mentees should take responsibility for managing the meetings. They should start by agreeing with their mentors on a regular schedule that is both feasible,

considering time commitments, and adequate, allowing them to reach their intended goals. One suggested structure for each mentoring meeting begins with a social opening, followed by agenda negotiation, goal setting, discussion of two to three topics, and a closing, including a summary and plans for the next two to four weeks.<sup>22</sup> A mentee should write an agenda for each meeting, even if it is simply for his or her own personal organization, to keep track of goals and progress. Some mentors may like to receive a written agenda and questions ahead of time; others just like to arrive and talk. At each meeting, a mentee should inform the mentor of his or her progress since the last meeting and ask what is expected in terms of tasks before the next meeting.<sup>4</sup> A mentee should use a mentor's time wisely by keeping meetings as short as possible or cancelling an appointment in advance if there is neither anything new to report nor new issues to discuss. Mentees should keep in mind, however, that nothing new to report can represent a road block they have encountered, and mentors may be able to help navigate this problem.

### Challenges

Dissatisfaction and problems are common to every relationship, including mentorships. Finding a successful mentoring relationship is like dating: one cannot expect a perfect fit every time, and a good relationship takes work. Dissatisfaction may occur from a mismatch of goals, commitment, or expectations; from a reluctance of the mentee to own and pursue his or her own development; or from a mentee's reluctance to ask for personal help.<sup>5,13</sup> There can be power issues (over ownership of authorship or resources), generational tensions (over differences in work schedule expectations), or personality clashes (over differences in communication or work style). Occasionally, a mentor enters a mentorship in search of a clone, encouraging mentees to be dependent rather than to cultivate their own ideas.<sup>8</sup> When problems occur, either the mentee or mentor can suggest a change, and the approach to the problem depends on the mentee's and mentor's styles. Often, another person outside the mentoring relationship can offer advice about disagreements or concerns. Common mentor complaints are that the mentee did not follow through, the mentee did not use the mentor's time effectively, or there was a poor fit with work style and/or

personality.<sup>19</sup> If a mentee is aware of potential difficulties early, knows his or her values and needs, and manages up, then many of these problems can be avoided.<sup>12</sup>

Long-distance mentoring relationships, becoming more common as both mentees and mentors move institutions or as a mentee seeks specific expertise, inspire their own unique set of potential problems, including ineffectiveness because there is no direct observation or accountability, and misunderstandings due to phone and e-mail communications.<sup>18,23</sup> Some ways to make long-distance mentoring more successful include establishing the relationship in a face-to-face meeting and then continuing it at a distance, having occasional face-time at conferences, and having clear expectations set up about roles and goals.<sup>18</sup>

### Separation

All relationships naturally change and evolve, and this is true of mentoring.<sup>9</sup> Ideally, there will be a planned separation as mentees advance their careers, attain their goals, and become more collegial with their mentors. Mentorship needs evolve over time, and managing up helps smooth the transition of ending the mentoring relationship and moving toward more equal standing. Often, both the mentor and mentee recognize that their mentoring relationship has fulfilled its purpose, and both are ready for a change. Occasionally an insurmountable problem may occur such as differences in communication, respect, or resource use that leads to the sudden end of a mentoring relationship. Ideally, to promote productive future interactions, the mentor or mentee should directly address the transition, rather than letting the relationship dwindle away or avoiding talking about a problem. Part of the mentoring relationship is to communicate about any issues so that, as one mentoring relationship evolves, a mentee begins thinking about next steps and potential future mentors, if needed.

### In Sum

Mentoring is an evolving relationship that requires time and attention to develop and includes successes and challenges. We outline the strategy, managing up, which may be helpful to improve mentoring relationships but that has not yet been empirically tested in

academic medicine. Nevertheless, following these tips is likely to improve communication and the experience of both mentor and mentee. Next steps for research in this area include testing the success of this strategy in groups of mentees, so we are planning a phased, randomized study at a single institution. When a mentee knows him- or herself, knows his or her values and needs, manages up, makes the relationship a high priority, and shows appreciation, he or she will most likely become successful. By implementing these specific tasks, mentees can nurture and improve a relationship that may ultimately become a productive and enjoyable force in the careers of both the mentor and the mentee.

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