



MENTORSHIP PROGRAM ROADMAP

The purpose of this roadmap is to provide guidance to the mentors during the six months mentorship program. These guiding principles are optional. It is at the discretion of the mentors and the mentees to determine which activities (listed in the roadmap or not) should be completed within the program timeframe. Before the introductory call, both mentors and mentees that participate in the AUTM Mentorship Program should read over the expectations below, which will help facilitate a productive mentor/mentee relationship:

The mentee should lead the mentor/mentee relationship with respect to goals and should:

- Select a mentor based on criteria relevant to your goals
- Have a clear understanding of why you want to be mentored
- Be responsible for follow up
- Come prepared with specific goals or areas of interest to discuss (examples of potential goals, areas of interest, skills, etc. provided in **APPENDIX 1**)
- Complete any pre-work and prepare for calls
- Participate in training and check-in calls
- Be open to feedback
- Maintain confidentiality
- Take responsibility at the end of each call to schedule the next call
- Be capable of saying if the relationship is working or not

The mentor should be the “caretaker” of the mentor/mentee relationship and should:

- Provide a structured background/framework to help mentee perspective (i.e., provide suggestions for goals, skill development, activities, etc.)
- Advise - don't dictate
- Be accessible and responsive



- Fulfill the minimum time commitment agreed upon by both parties
- Maintain confidentiality
- Be honest and provide candid feedback
- Check-in on the mentee periodically (especially if there has been no recent contact from mentee)

Recommended Mentor/Mentee Partnership Timeline:

Within 2 weeks of being matched: Mentor will make initial contact with Mentee to schedule initial meeting.

1st meeting

PREWORK: (1-2 weeks before meeting) Mentee will determine concrete goals for mentoring partnership. Goals could be personal and/or professional goals. (Example Goals can be found in Appendix 1)

MEETING TOPIC: *Mentors and Mentees will introduce themselves, discuss profiles and work experiences, current job responsibilities, etc.*

EXAMPLE OF MENTOR'S QUESTIONS FOR INITIAL MEETING:

1. What is important to you?
2. What is your background?
3. Which area have you practiced the most?
4. What areas of (insert mentees' areas of interests) would you like to develop?
5. What skills do you have with which you are confident?
6. How do you use these skills on the job?
7. Which skills do you desire to develop?
8. How can I help you develop these skills?
9. What attracted you to this program?
10. Six months from now, how would you like to have grown as a result of this mentoring relationship?



11. What have you accomplished, and what did you learn from that experience?
12. What influenced your career path so far both positively and negatively?
13. What one thing can I do to ensure a positive experience for you in this relationship?
14. What should I expect from you in this mentoring partnership?

MEETING CONCLUSION: At the end of 1st meeting, Mentee and Mentor should agree upon goals and expectations for mentoring partnership by the end of the 1st meeting. Next meeting should be scheduled at the end of the 1st meeting.

2nd Meeting

PREWORK: (1-2 weeks before meeting) Mentee will develop draft of Individual Development Plan (IDP) based on discussion of 1st meeting. Mentee will send draft prior to 2nd Meeting.

MEETING TOPIC: Mentors and Mentees will discuss draft IDP. Mentees will review short term and long term goals discussed during 1st meeting. Mentee explains how they may achieve goals or ask for assistance in how to achieve goals. Mentors will provide feedback based on their experience and make recommendations.

OTHER SUGGESTED ACTIVITIES:

1. Mentor reviews mentees' resume and suggests areas in which the mentee may want to enhance their knowledge or skills.
2. Mentee may discuss long-term dream job position description.
3. Together, Mentor and Mentee to complete an Individual Development Plan (IDP)

MEETING CONCLUSION: At the end of the 2nd Meeting: Mentor and Mentee to schedule next meeting and plan any additional follow up needed to start working on IDP goals (i.e. sending reading materials, making introductions to new contacts, etc.)

Recommended timing and activities for Meetings 3-6:

3rd Meeting: Should be scheduled approximately 2-4 weeks after 2nd Meeting. Mentors and Mentees to schedule next meeting at the end of 3rd Meeting.

4th Meeting: Should be scheduled approximately 2-4 weeks after 3rd Meeting. Mentors and Mentees to schedule next meeting at the end of 4th Meeting.

5th Meeting: Should be scheduled approximately 2-4 weeks after 4th Meeting. Mentors and Mentees to schedule next meeting at the end of 5th Meeting.

6th Meeting: Should be scheduled approximately 2-4 weeks after 5th Meeting.



Role Play Scenario: Mentor and Mentee to role play a scenario that Mentee may encounter in their career. Examples include: handling difficult investigators, invention intake, license negotiation (initial discussions, particular clauses, etc.)

PREWORK: (1-2 weeks prior to Role Play) Mentee to create scenario and send details to Mentor. Mentor to prepare questions/responses appropriate for scenario. Scenario should be relevant to IDP goals and what Mentee hopes to learn.

MEETING TOPIC: Mentee and Mentor to role play scenario. At the end of scenario, Mentor and Mentee to discuss how the scenario was handled, Mentor to give feedback to Mentee, both discuss alternative ways to handle scenario.

Journal Club/Case Studies: Mentor and Mentee to review relevant literature or case study that is relevant to Mentee's goals. Examples: agreement/licensing templates, recent patent law cases, AUTM discussion board topics, etc.

PREWORK: (1-2 weeks prior to Meeting) Mentor or Mentee to send reading materials for review prior to meeting. Mentee to prepare questions based on materials.

MEETING TOPIC: Mentor and Mentee to discuss literature or case study. Mentor to guide discussion. Mentee to ask questions. Mentor and Mentee to discuss related materials that may be of interest to Mentee to read in the future.

New Contact Meeting: Mentor to set up meeting with new point-of-contact that may be of value to mentee.

PREWORK: (1-2 weeks prior to meeting) Mentor to schedule meeting with new point-of contact.

MEETING TOPIC: Mentor to introduce Mentee to new point-of-contact and describe Mentee's personal or professional interests. Mentor to facilitate discussion.

Work Challenges: Mentor and Mentee to discuss current work-related challenges or problems the Mentee is experiencing.

PREWORK: (1 week prior to Meeting) Mentee to send brief summary of challenge or problem. Mentor to review situation.

MEETING TOPIC: Mentee to present challenging situation. Mentor and Mentee to discuss ways to handle current challenge, prevent challenge in the future, etc.

Other Recommendations:

- Mentee to present recent accomplishment; Mentor gives feedback
- Mentor invites Mentee for conference call/meeting



- Discuss networking opportunities and strategies
- Mentor and Mentee to attend industry-related function (if in same geographic area)
- Discuss work/life balance and how to manage stress

SAMPLE

PERSONAL ASSESSMENT AND IDENTIFY GOALS		
Where Am I Now?	Where Do I Want To Be Ideally? <i>(No Time Limit)</i> <i>(LIST IN ORDER OF PRIORITY)</i>	
<ol style="list-style-type: none"> 1. 2. 3. 4. 	<ol style="list-style-type: none"> 1. 2. 3. 4. 5. 	
CREATE A PLAN BASED ON PRIORITIES		
Objectives <i>Identify competencies and/or areas to develop</i>	Action Steps <i>Define training needed, computer skills, professional support required</i>	Timeline <i>Set realistic timeline for completion</i>
1		
2		
3		



4			
5			



Example of Mentee Goals and Skills to work toward or develop during the mentoring period

Goals

- Job promotion
- Transition between agency, private and/or university sectors
- Professional development
- Learning through deep dives into specific topics (Patent Prosecution, Licensing, Sponsored Research, Clinical Research, SBIR process)
- Improving skills (examples listed below)

Technical skills

- Negotiation skills
- Licensing terms knowledge
- Knowledge of patent process
- Project management
- Start-up-related finance knowledge (Skill to develop, Effort to learn: high, Impact on career: high, Big Bang)
- Strategic thinking
- Marketing
- Prior art searching
- Analytical skills

Professional skills

- Communicate complex information in a clear manner
- Customer service approach
- Make decisions in a short time period based on relevant information
- Networking with others in the field (both licensees and colleagues) (Skill to strengthen, Effort to learn: low, Impact on career: medium, Quick Hit)

Behavioral skills

- Being able to deliver tough messages in calm manner
- Staying calm under pressure
- Thinking instead of just reacting
- Being approachable and communicating clearly

Conceptual skills



- Strategic thinking for IP management and license negotiation
- Ability to triage competing interests
- Being able to organize and keep track of deadlines
- Creativity for determining licensees and overall approach