FIRST MEETING CONVERSATION TEMPLATE

Exploring Personal Goals

Mentor Name: _____

Mentee Name: _____

Date: _____

About This Template

Use this guide to structure your first mentor-mentee conversation around personal goals, growth areas, and next steps.

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1. Looking at Today

How would you describe your current situation?

☐ Very satisfied ☐ Satisfied ☐ Neutral ☐ Unsatisfied ☐ Very unsatisfied

Why?

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2. Looking Ahead

Where would you like to be in:

6 months?	1 year?	3 years?

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3. Areas for Growth

Which areas would you most like to improve?

☐ Confidence
☐ Business Skills
☐ Financial Skills
☐ Digital Skills
☐ Communication
☐ Leadership
☐ Networking
☐ Time Management
☐ Other: _____

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4. Biggest Opportunity

What opportunity would you most like to take advantage of in the next year?

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5. First Small Step

What is one realistic action you can take in the next 7 days?
