

NAHU Leadership Mentor Program

Deadlines:

- Applications are accepted year-round.
- All completed applications will be reviewed by the Chapter Leadership Development Committee.
- Letters of acceptance will be sent to selected applicants by email.
- The Leadership Development Mentor Program will begin on the first of the month following your acceptance, or on the program start date of July 1, whichever is sooner.

Program Information:

The Leadership Development Mentor Program provides senior leadership support to new and/or current members. The mentors participating in this program have been selected for their industry knowledge, thought leadership, and the longevity of senior leadership positions within the National Association of Health Underwriters. It is the goal of the Mentor Program to develop the skills, confidence and executional ability of new leaders with the intent of future growth and alignment within the Association. **The requirements to be a mentor are:** Be a licensed agent for at least 5 years, worked in the insurance industry as an agent or with agents for at least 5 years, be an active member of AHU, desire to help agents grow, be familiar with and review the opportunities available from NAHU (certifications, designations, etc.).

Program Expectations:

Mentees will schedule monthly one-hour virtual meetings with their assigned mentor to discuss, strategize, and garner support for their incoming leadership role and future goals.

Program Duration	One Year
Expected Minimum Commitment	One Hour Per Month

INSTRUCTIONS:

Online Applications: <https://nahu.org/chapter-resources/mentor-program>

Please complete all application questions as comprehensively as possible. Your application should be submitted online. The mentorship task force meets monthly (2nd Thursday of the month) and mentorship assignments received prior to that meeting will begin the first of the following month.



NAHU Leadership Mentor Program Scheduling and Meeting Expectations

Welcome to the NAHU Leadership Mentor Program!

Below you will find some helpful guidance on getting your mentor meetings scheduled.

1. With your calendar available, think about which day of the week you may have more free time than others, or a day of the week you have less distractions or obligations. For some, this may be the end of the week.
2. Additionally, you may wish to consider if a particular time of each month is better. For example, at the start and end of each month, you may have procedural obligations that could interfere with your mentor meetings.
3. It may be helpful to determine a consistent monthly schedule that is easy for you and your mentor to remember, like selecting 'the third Thursday of every month'.
4. Think of 3 to 4 different dates and times to present to your mentor to reduce schedule conflict and provide adequate options.
5. Don't forget, your mentor may be in a different time zone than you! Be sure to review your mentor's bio which will include their location.

Next Steps:

- Present your scheduling opportunities to your mentor.
- Confirm your first meeting and get it on both calendars!
- Review your introductory meeting worksheet and begin prepping your initial agenda.

Remember, the mentee is responsible for scheduling and maintaining your mentorship meetings. We understand that sometimes a conflict occurs unexpectedly, and meetings must be rescheduled. Please do your best to give advance notice to your mentor and offer re-schedule options as soon as possible.

If you have any questions, please contact your L&D Committee Liaison using the contact information listed below:

Brooke Willson
bwillson@NAHU.org

Enjoy your first meeting!



NAHU Leadership Mentor Program Introductory Meeting Worksheet

It's time for your first mentor meeting.

As you prepare for your introductory meeting with your mentor, be sure you have reviewed your mentor's bio and the scheduling recommendations provided to you.

Your first meeting should be both formal and informal. What do we mean?

- **Introduce yourself personally.** Authenticity will be the key to building a lasting and productive relationship with your mentor throughout the year.

Conversation ideas:

- What are some meaningful commitments in your life?*
- Are you career driven?*
- Do you focus more on family than work?*
- Are you philanthropic?*
- What is your style of leadership at home vs. work?*
- Favorite sports team?*
- Any notable experiences being a NAHU member?*
- What is your favorite season?*
- Biggest achievement?*
- Most embarrassing 'failure'?*

- **Don't forget to ask your mentor about themselves.** The authenticity works both ways! It's important you get to know your advisor as well. If you're having difficulty getting the conversation flowing, you can use the enclosed template to get you started.
- **Talk about your goals.** Let your mentor know what your goals are for the year ahead. Pro-tip: You can have more than one! Prioritize your goals by difficulty and consider which ones you'd like to tackle first. Do you want to get the easy wins out of the way first, or get started on a harder one?
- **Make a PLAN.** You've probably heard the saying "a goal without a plan is just a dream". Start noting down some action items you can work on in the time between your mentor meetings. This way, you'll have a great progress report for next time!
- **Schedule your next meetings.** Make sure you have your next meeting on the calendar and the follow-up expectation set.

Enjoy!



NAHU Leadership Mentor Program Introductory Meeting Worksheet

Date:		
Attendees:		
Goal #1: <i>(Be precise and direct. Even BIG goals have a starting point!)</i>		
What is the driving purpose of this goal? <i>(i.e., what is your 'why'?)</i>		
What are the action items needed to progress toward this achievement? <i>(you may add more steps as needed)</i>	<ol style="list-style-type: none"> 1. 2. 3. 4. 5. 	
Mentor action items: <i>(is there anything your mentor can/should do to help?)</i>		
Target timeframe to achievement? <i>(try to be realistic!)</i>		
Progress checks: <i>(monthly or quarterly?)</i>		



NAHU Leadership Mentor Program Introductory Meeting Worksheet

Date:		
Attendees:		
Goal #2:		
What is the driving purpose of this goal?		
What are the action items needed to progress toward this achievement?	<ol style="list-style-type: none"> 1. 2. 3. 4. 5. 	
Mentor action items:		
Target timeframe to achievement?		
Progress checks:		



NAHU Leadership Mentor Program Introductory Meeting Worksheet

Date:		
Attendees:		
Goal #3:		
What is the driving purpose of this goal?		
What are the action items needed to progress toward this achievement?	<ol style="list-style-type: none"> 1. 2. 3. 4. 5. 	
Mentor action items:		
Target timeframe to achievement?		
Progress checks:		



NAHU Leadership Mentor Program Progress Reports

Both you and your mentor will be keeping a progress report on the goals you've set together. This helps both of you measure your individual and combined success, and can help make any necessary adjustments throughout the year.

Let's talk about adjustments.

Occasionally you may need to revise your action items or your timeline to ensure a better chance of success. This is okay!

Your mentor will help you adapt to the challenge and embrace it as an opportunity to overcome the unexpected.

TIPS:

- Try not to get discouraged if your plan doesn't play out exactly as you thought it would when you set your goal.
- Your mentor is available to support you through the ebbs and flows of professional development. Be sure to use your mentor as a resource.
- Don't be afraid to embrace what you perceive to be 'failure'. A shift in direction can often be a welcome and needed change to overcome a plateau.
- Find some inspirational quotes to place in your workspace. Simple and impactful reminders of your potential can help keep motivation high!

Tracking Progress:

Enclosed you will find your Progress Report Worksheets. Please complete the worksheet assigned to you and submit it to your committee liaison listed below on a quarterly basis.

Brooke Willson
bwillson@NAHU.org

NOTE: You may wish to complete the worksheet monthly, however; submissions to the committee should be made *quarterly*.

Progress Report Due Date(s):	October 3 rd
	January 3 rd
	April 4 th



NAHU Leadership Mentor Program Progress Reports

Progress Report Worksheet

To be completed by mentor

Date:	___ / ___ / ____
Mentee name:	
Completed by:	
Sharing options:	Share with mentee <input type="checkbox"/> Committee only <input type="checkbox"/>

Please select a rating between 1 & 10 with 1 being 'not at all' and 10 being 'absolutely'.	
Are your mentees goals clearly established?	1 2 3 4 5 6 7 8 9 10
In general, have action items been consistently completed according to the initial timeframe(s) set?	1 2 3 4 5 6 7 8 9 10
Do you feel confident that your mentee is engaged and participating in the program?	1 2 3 4 5 6 7 8 9 10
In your opinion, are the goals set by you and your mentee [still] attainable within the course of the program?	1 2 3 4 5 6 7 8 9 10
Do you feel you are able to maintain a meaningful relationship with your mentee?	1 2 3 4 5 6 7 8 9 10
In general, have your meetings been according to schedule and on-time?	1 2 3 4 5 6 7 8 9 10
Has your mentee been respectful and considerate during your interactions?	1 2 3 4 5 6 7 8 9 10
Do you feel your mentee understands their full potential in leadership [yet]?	1 2 3 4 5 6 7 8 9 10
In general, do you feel this program is [still] valuable to incoming leaders at NAHU?	1 2 3 4 5 6 7 8 9 10
TO BE COMPLETED BY COMMITTEE ONLY	SCORING: _____

NOTES: <i>(please provide additional feedback as needed)</i>



NAHU Leadership Mentor Program Progress Reports

Progress Report Worksheet

To be completed by [mentee](#)

Date:	___ / ___ / ____
Completed by:	
Mentor name:	
Sharing options:	Share with mentor <input type="checkbox"/> Committee only <input type="checkbox"/>

Please select a rating between 1 & 10 with 1 being 'not at all' and 10 being 'absolutely'.										
Are your goals [still] clearly established?	1	2	3	4	5	6	7	8	9	10
Do you feel you have had adequate engagement with your mentor to strategically plan your success?	1	2	3	4	5	6	7	8	9	10
Do you feel confident in your ability to speak openly with your mentor?	1	2	3	4	5	6	7	8	9	10
In your opinion, are the goals set by you and your mentor [still] attainable within the course of the program?	1	2	3	4	5	6	7	8	9	10
Are you satisfied with the approach your mentor has taken to advise you?	1	2	3	4	5	6	7	8	9	10
In general, have your meetings been according to schedule and on-time?	1	2	3	4	5	6	7	8	9	10
Has your mentor been respectful and considerate during your interactions?	1	2	3	4	5	6	7	8	9	10
Do you feel your mentor understands the importance of your goals, and why?	1	2	3	4	5	6	7	8	9	10
In general, do you feel this program is [still] valuable to you as a mentee?	1	2	3	4	5	6	7	8	9	10
TO BE COMPLETED BY COMMITTEE ONLY	SCORING: _____									

NOTES: *(please provide additional feedback as needed)*



NAHU Leadership Mentor Program Progress Reports

What if you and your mentor/mentee aren't a great fit?

Every now and then we may find a personality conflict or a poor match. We ask that you keep an open and inquisitive mind if you feel you're running into issues with your program partner.

Try to approach any differing opinions with respectful curiosity and do your best to work through any initial clashes. Ask questions and make a good faith attempt to practice patience and tolerance – these are key skills that are required for great leadership as you march forward into your career and within our association.

Remember, diverse perspectives strengthen a collaborative effort, and these types of challenges are needed to grow and learn!

However, we don't want you to feel stuck with someone you're *truly* not aligned with as this can negatively affect goal planning and subsequent success. If you've tried to resolve the conflict together and been unable to reach a satisfactory compromise, please contact your Committee Liaison for potential reassignment.

We extend our thanks to you for participating in the program and giving every effort to ensuring its success!