

The Coffee Chat Protocol

Using Informational Interviews to Find Mentors and Opportunities

Linda Louie, Assistant Director
Office of Career and Professional Development

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Welcome!

While you wait, if you'd like, say hi in the chat!

1. What's one fear/concern you have about how to conduct a coffee chat?
2. Has anyone ever set up a coffee chat with you? (e.g. a prospective student?) How did it go?

Hello from OCPD's Researcher Team!

Career Counselors



Linda Louie, PhD
Assistant Director, PhDs



Ray Care, PhD
Program Director



David Blancha, PhD
Program Manager

Peer Advisors



Trase Aguigam

- PhD Candidate, Tetrad
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Jocelyne Fadiga

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- Intern, OCPD

This January, we're celebrating Mentoring Month

Find a mentor. Be a mentor. See: tiny.ucsf.edu/UCSFmentor

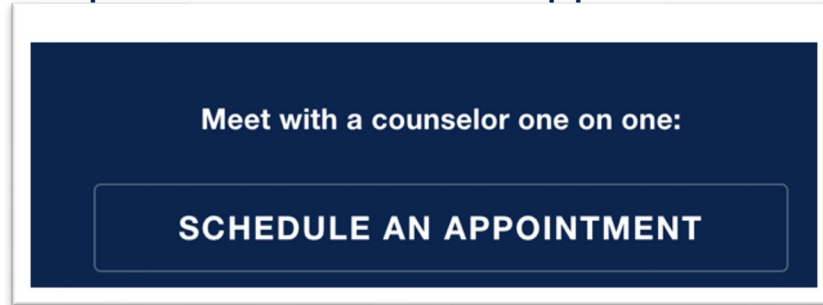
- ~~**Jan 16 @ 12 pm: Online Professional Profile**~~
- **TBD (rescheduled):** UCSF Student and Alumni Mixer at Spark Social
- **Jan 22/23:** Choosing a Thesis Lab workshop and office hours
- **Jan 30:** Lunch and Learn – Create an Online Professional Profile in 90 Minutes or Less
- **Jan 30:** Mentoring Awards
- **Anytime:** Participate in MentorQuest and win a \$50 gift card!



See today's slides (lots of templates!):
<https://tiny.ucsf.edu/CoffeeChatSlides>

Questions? Come see us!

<https://career.ucsf.edu/appointments>



Why do you want to conduct a coffee chat?

What's a fear, concern, or question you have about how to do it?



What you'll learn today:

- The “protocol” for setting up a coffee chat with someone you don't know
- How to write an “invitation to connect” that is likely to get a positive response
- How to prepare questions for an informational interview
- What steps you can take to ensure a productive conversation



What we'll do today:

I. 11 am-12 pm: Learn and Reflect

1. Reflect on your goals
2. Learn the protocol

II. 12-12:30 pm: Apply and Practice (Optional)

1. Draft a “request to connect”
2. Brainstorm questions you might ask
3. Strategize about whom to connect with
4. Get and give feedback (breakouts) and/or office hours

The protocol for coffee chat success:



- Know your goal.
- Ask for the right thing.
- Reach out to the right people.
- Reach out the right way.
- Ask the right questions, in the right order.
- Follow up.



The best networkers are not born, but rather work very hard at developing their skills, investing both time and effort.

Anand and Conger (2007)
Networking researchers

Evidence-based sources for this workshop:

- Anand, N., & Conger, J.A. (2007) “Capabilities of the Consummate Networker.” *Organizational Dynamics*, 36(1), 13-27.
- Forret, Monica. (2018) “Networking as a Job Search Behavior and Career Management Strategy.” *The Oxford Handbook of Job Search and Job Loss*: 275-291.
- Ibarra, H. (1995) “Race, opportunity, and diversity of social circles in managerial networks.” *Academy of Management Journal*, 38, 673-703.
- Ibarra, H. and Mark Lee Hunter. (2007) “How Leaders Create and Use Networks.” *Harvard Business Review Magazine*.
- Inkson, K., & Arthur, M.B. (2001) “How to be a successful career capitalist.” *Organizational Dynamics*, 30, 48-61.
- Tichy, N.M., et al. (1979) “Social network analysis for organizations.” *Academy of Management Review*, 4, 507-519.

□ Know your goal.

What IS a coffee chat?



A 30-40-minute conversation with a professional contact, which you seek out for your professional development.

Who we think should do coffee chats:



Who we think should do coffee chats:

Early-stage
grad
students

With whom?

People in and around your university (students; postdocs; staff; faculty); people in your field (visiting faculty; lecturers; conference contacts)

Why?

- Make informed decisions (e.g. thesis lab)
- Learn about opportunities (e.g. lab get-togethers; funding; postdocs)
- Understand how to be competitive for those opportunities (e.g. skills to emphasize)
- Be less isolated and more independent

Who we think should do coffee chats:

People
preparing for
faculty jobs

With whom?

People in the types of institutions you think you'll want to apply for (e.g. research-focused, teaching-focused). (*See career.ucsf.edu/acra)

Why?

- Make informed decisions (would I like this?)
- Learn about opportunities (e.g. positions that may be opening up in the future)
- Understand how to be competitive for those opportunities (what problem could you solve?)
- Be less isolated and more independent

Who we think should do coffee chats:

People
preparing for
industry jobs

With whom?

People in the types of companies you think you may want to apply for (e.g. startups, nonprofits, big pharma...) + location where you want to be.

Why?

- Make informed decisions (would I like this?)
- Learn about opportunities (e.g. positions that may be opening up in the future)
- Understand how to be competitive for those opportunities (how does hiring work?)
- Be less isolated and more independent

Who we think should do coffee chats:

People who want to be leaders in their current or future workplaces

Research shows that successful managers are more likely to engage in networking behavior.

(cf. Luthanz, Rosenkrantz, and Hennessey)

With whom?

People in your current organization; people in places you may want to be in the future; people in similar roles at different places.

Why?

- Learn about future opportunities
- Be less isolated and more independent
- **Better understand your professional landscape**
- **Receive coaching and mentoring**
- **Bring new insights and ideas into your current place of work**

Reflection: Why are you doing coffee chats?

- I'm an early-career graduate student
- I'm preparing for faculty careers
- I'm preparing for careers in other fields (e.g. public health, industry, nonprofits, government, venture capital)
- I want to be a leader in my current workplace/field



Reflection: What goal are you focused on?

- I want to make an informed decision about whether [x] career / lab/field/workplace is right for me
- I want to know about opportunities in [x] company/field/department/ university
- I want to know what it means to be a strong candidate for [x] roles
- I want to be less isolated and more independent



The protocol for coffee chat success:



- Know your goal.
- Reach out for the right thing.

□ Ask for the right thing.



“Hello, stranger. I need your help. Can you help me?”



“Why would a stranger help me?”

The goal of a coffee chat is to become part of their extended community.

Before the coffee chat

- You're a stranger (to them)
- They may be willing to offer advice if you ask about their experience

After the coffee chat
(ideally)

- You're a part of their extended community
- They may be willing to offer help if you demonstrate that you take their advice

Coffee chats effectively build “trust.”

Cross et al. (2001)

- Awareness of the other person’s knowledge and expertise
- Active give-and-take of information
- Comfort with asking questions, sharing challenges
- Maintaining contact when you *don’t* need a favor

The “right thing” = Information about them

- The aim of an effective coffee chat is to foster trusting professional relationships.
- Trust takes time.
- Help (opportunities, referrals, advice, sponsorship) may follow. But don't lead with that request.





These informational chats are a bit of a long game. I talked to the director of one [company] I was interested in. Six months later, he asked if I was still looking as he had an opening he thought I'd be a good fit for (I had already accepted another job).

Anat Mooreville
UCLA PhD alum

What opportunities will you want in 3-12 months?

- Reflect on the kinds of opportunities you may want 3-12 months from now: those are the ones you want to “coffee chat” around right now.
- Ideas: Jobs; internships; collaborations; recommendations; letters of support; financial opportunities (funding, campus positions, consulting, contract work).



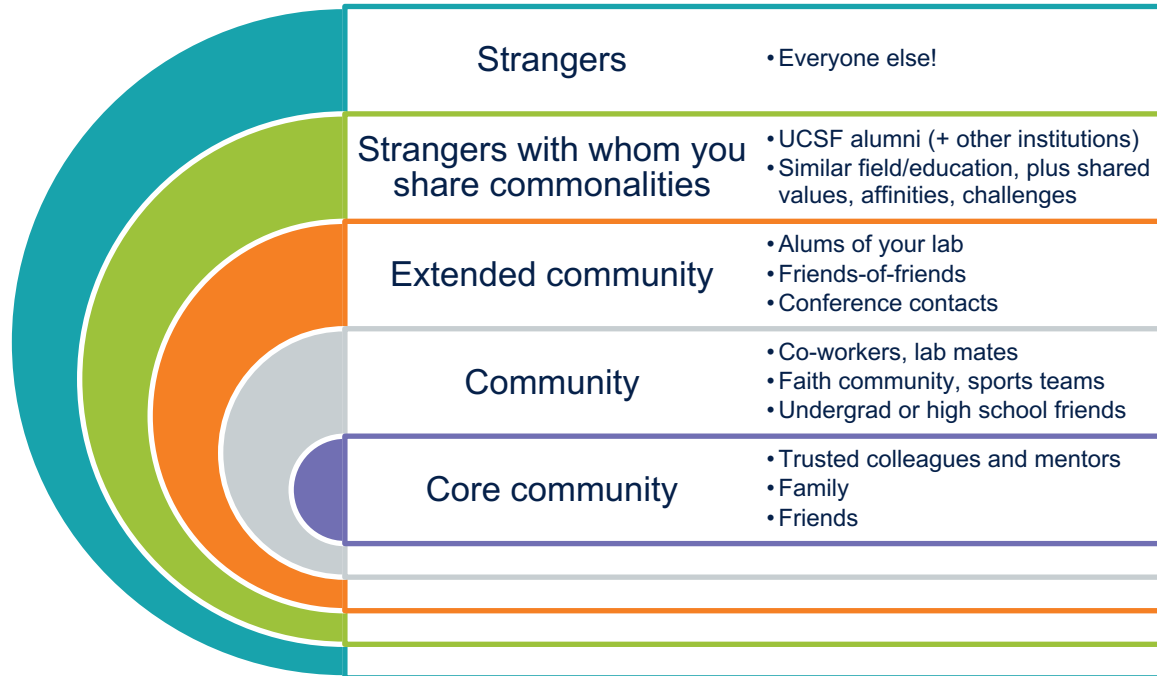
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- Know your goal.
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□ Reach out to the right people

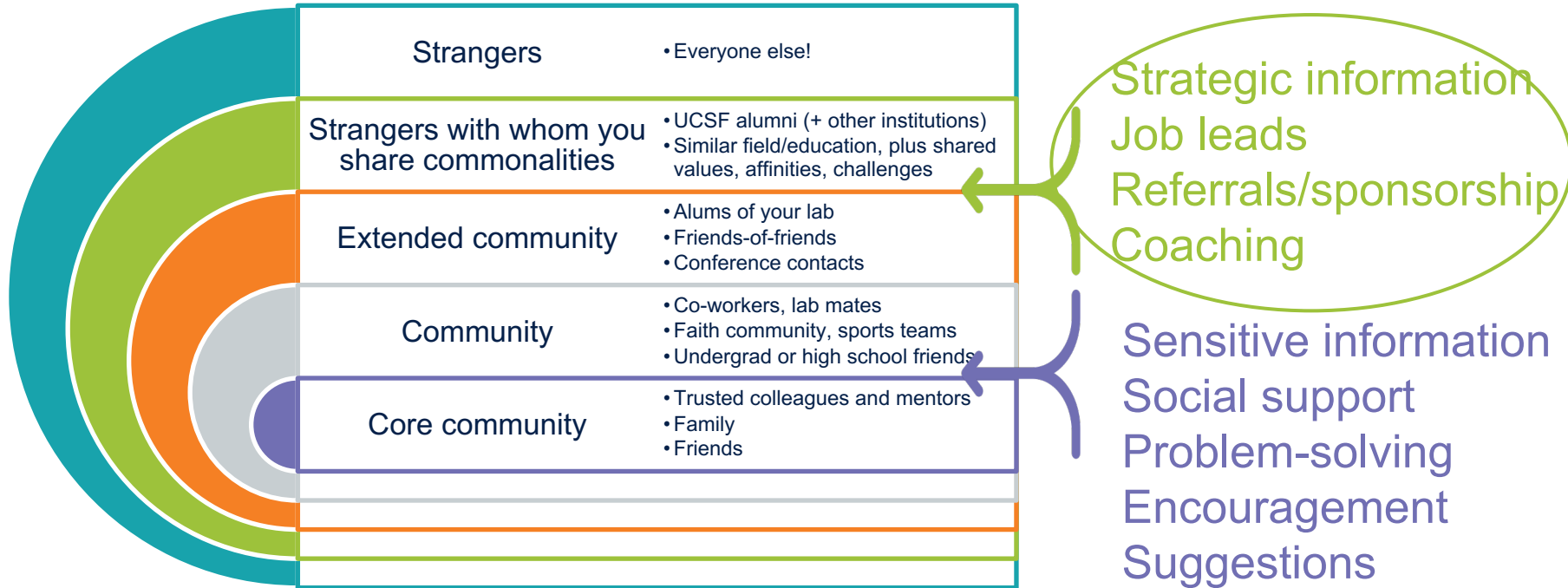
We all have different kinds of relationships.



What the research says:

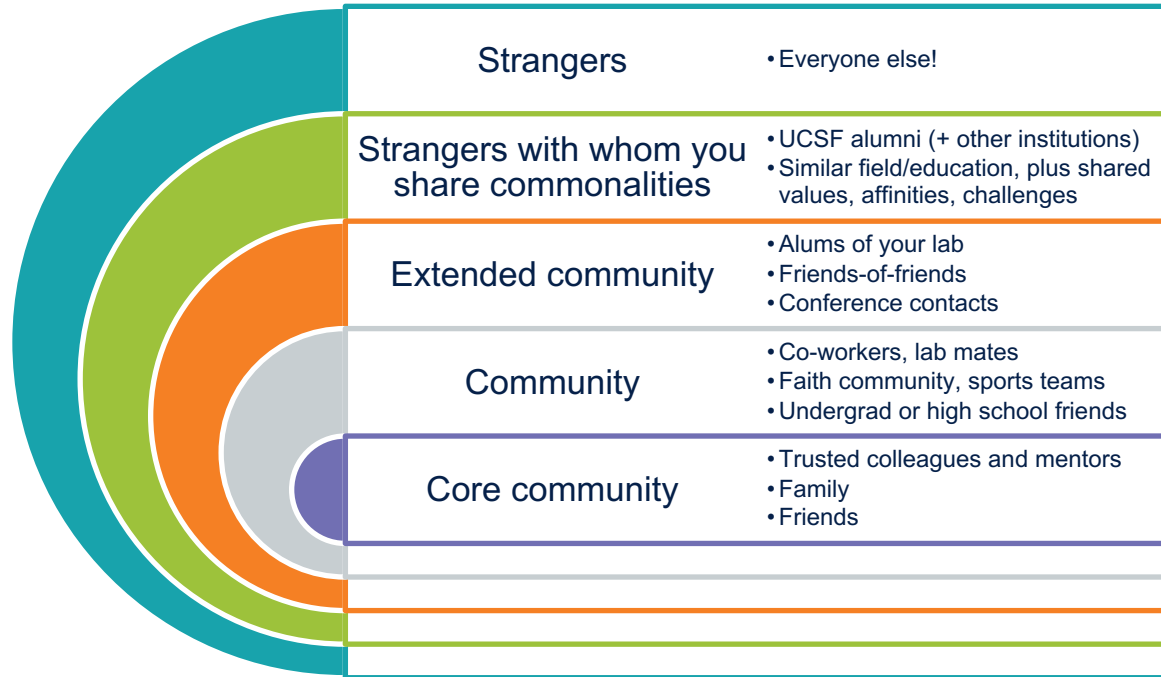
- “Strong ties” (core community + community)
 - Easier to discuss fears and concerns
 - More willing to help you problem-solve
 - More likely to divulge sensitive information
 - More similar to you
- “Weak ties” (extended community/ strangers with whom you share commonalities)
 - More likely to offer job leads
 - More likely to result in higher salary and job title
 - More likely to be different from you

The coffee chat sweet spot:



Seek out “strangers with commonalities.”

True, it’s more work... but there are more of them!



With cold contacts, you’re currently a “stranger with whom they have commonalities...”



...seeking to become a member of their “extended community.”

This is totally normal within U.S. workplace culture!

But first – consider your community.

- Think about your previous reflection and the kinds of opportunities you're looking for.
- Are there “extended community” who might know about such opportunities? (Friends of friends? Alums of your lab? Visiting speakers?) See if you can brainstorm a few.
- Also, have you told your core community that you're looking for such opportunities?



Have you ever helped someone else this way?

- Can you think of “people you know a little” who have reached out to you for advice, information, connections? Have you ever helped circulate an opportunity?
- How did you react?



The protocol for coffee chat success:



- Know your goal.
- Ask for the right thing.
- Reach out to the right people.
- Reach out the right way.

□ Reach out the right way



“Hello, stranger. I need your help. Can you help me?”



Follow this order (if using LinkedIn):

1. Request to connect.
2. Write a short message explaining why you want to connect and asking for a 30-minute chat to learn more about them.
3. Later, if relevant you can follow up and ask for advice/help.
4. (Or, if the request is timely: save your ask for the end of the coffee chat.)

Follow this order (if using email):

1. Write a short email explaining why you want to connect and asking for a 30-minute chat about their experience.
2. Later, if relevant you can follow up and ask for advice/help.
3. (Or, if the request is timely : save your ask for the end of the coffee chat.)

In you request, ask for advice not help

The goal of a coffee chat is to become part of their extended community.

Before the coffee chat

After the coffee chat



“Hi, I was wondering if you could help me with the [X] part of my application. Would you look at that section and give me some feedback?”

Hi again, I so appreciated the advice you gave last week! I am applying for the grant now –I remember you mentioned X is the most important part. Would you be willing to take a look at that section and give me some feedback?”

Common reasons people don't reply:

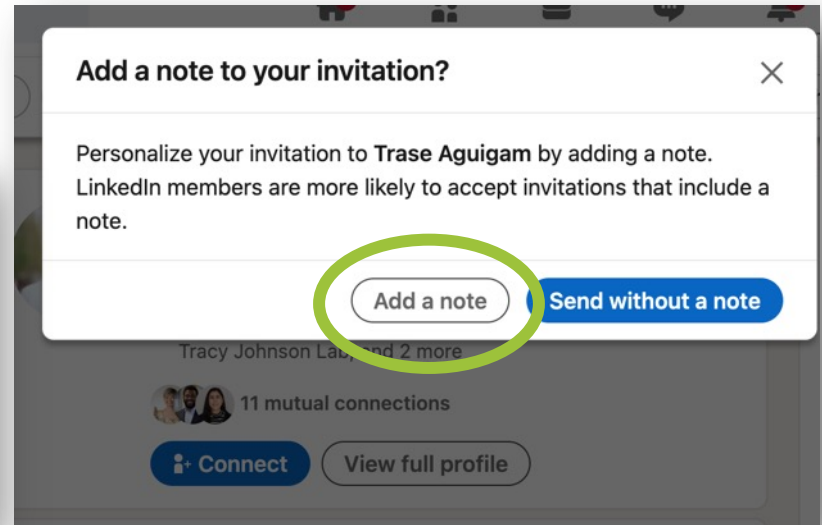
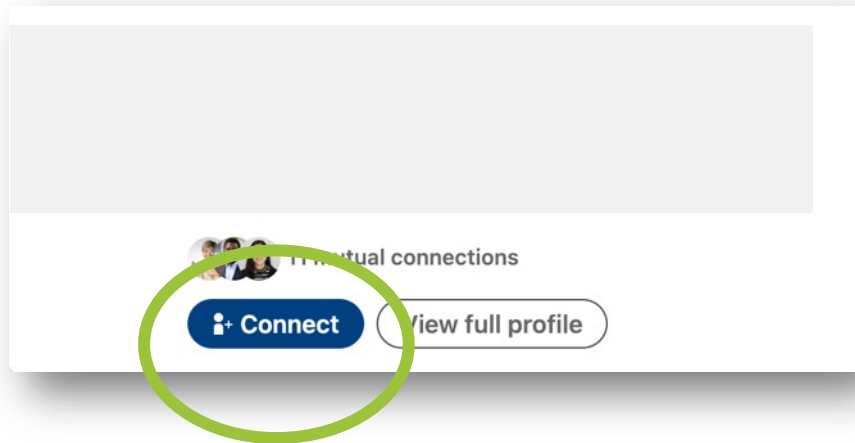
- **You didn't add a note to your LinkedIn request to connect** – then you are just a “stranger” not a “stranger with commonalities”
- **You asked for help in your message** – before the coffee chat, you're not yet a trusted “extended community” member, so focus on asking for advice.
- **You didn't explain what you have in common** – The key to getting the coffee chat is to stress your commonalities (can be as simple as a shared academic institution) and why you're curious about their field, org, lab.
- **You didn't specify how much time you're asking for** – Being clear that you're only asking for 30 minutes can make it easier for them to say yes.
- **Only reaching out to one person** – Don't let the fact that you're waiting for a reply about one coffee chat prevent you from reaching out to someone else. I recommend sending messages in batches of three!



Templates!

1. The LinkedIn Request to Connect

1. Request to connect first (with a note.)



What the note says:

You only have 300 characters. Use them wisely!

- Your current title
- What you have in common
- A specific thing you think is interesting about them (their research, their company)
- Ask just to connect (not even asking for advice yet)

■ “Hi, Jared. I’m currently a UCSF student exploring careers in industry, and I saw that you recently made that transition. Mammoth sounds like an exciting place to be! I’d love to connect.”

2. The Actual Coffee Chat Invitation

An example for LinkedIn after you've successfully connected

- Mostly just reiterating what you said in your other message
- Plus, adding the request for a chat
- Add a bit more detail about commonalities or what interests you about them

“Hi, Jared. Thanks so much for connecting! As I mentioned, I am exploring careers in industry and became interested in Mammoth after I saw one of your colleagues Divya Das, speak on campus. Would you be willing to share more about your experience in a 30-minute Zoom chat sometime in the next few weeks?”

2. The Actual Coffee Chat Invitation

An example for someone in your “extended community”

- Mention how you know them (especially if it’s been awhile)
- Explain how your current goals are relevant to where they are now

“Hi, Lin, it’s been awhile since you graduated, I hope everything is going great with you and your family! I’ve recently decided to pursue consulting jobs, and I thought of you right away as someone who would have great advice. Might you be willing to chat about your experience at LEK over a 30-minute coffee sometime in the next few weeks?”

2. The Actual Coffee Chat Invitation

An example for early-stage grad students.

- Specify your program and year
- Mention a specific reason you're interested in the lab or research (can be very brief)
- Ask for less time, if reaching out to a PI (20 rather than 30 min)
- The rotation ask is inherently timely, so OK to refer to it in the message

“Hi Dr. A,
I'm a first-year student in the B program and I'm planning my rotations. I'm interested in your lab because C. Would you be available to discuss a possible rotation in your lab for 20 minutes sometime in the next two weeks?
Thank you,
D”

2. The Actual Coffee Chat Invitation

An example if you were connected by a friend/colleague in common

- Referrals are especially useful for coffee chats within academia (e.g. for faculty jobs, postdocs)
- Make sure to mention your common connection's name

“Hi, Peter Postdoc. I am a current UCSF PhD student working in [field], and Carlos from Stark Labs mentioned that you would be a great person to speak with to learn more about applying [X technique] to [Y]. Would you be willing to chat over a 30-minute coffee sometime in the next few weeks?”

2. The Actual Coffee Chat Invitation

An example for faculty job searches

- Include more detail about your research
- Consider asking for less time (PI = 20 min)
- In this case, attaching your CV may be helpful
- If in-person chats may be an option (e.g. at a conference), suggest those too

“Dear Dr. X, My K99 mentor, Y, suggested I reach out to you, as I shared with her that [university] is one of the institutions where I intend to apply for a faculty position this year. I’m wondering if you might have 20 minutes to chat with me about your experience at your institution. To share a bit about my background, I’m an immunologist who focuses on autoimmunity, using a type I diabetes mouse model. I’ve attached my CV to give you a sense of my background. If you’re going to ASCB this year, perhaps we can meet at the conference, but we can also talk by phone or Zoom; I’m flexible and will adapt to your schedule. Thank you for considering my request.

The protocol for coffee chat success:



- Know your goal.
- Ask for the right thing.
- Reach out to the right people.
- Reach out the right way.
- Ask the right questions, in the right order.
- Follow up.

□ Ask the right questions and follow up

Some basic etiquette:

- You create the Zoom or buy the coffee
- Scheduling can be tricky. Once they've said they're willing to chat, start by offering blocks of time when you're free on specific days, and express flexibility.
- Take notes (seriously)
- Remember to lead with interest and gratitude (rather than ambivalence)

Basic structure of the conversation:

- I. Introduction and thanks (2 min)**
- II. Their professional history/transition story (5-10 min)**
- III. Their current or future work (5-10 min)**
- IV. Advice for your situation (5-10 min)**
- V. Thanks and closing (2 min)**

See lots of examples of questions

- For grad students doing rotations:
 - <https://career.ucsf.edu/phds/manage-up/rotations>
- For non-faculty job searches:
 - <http://tinyurl.com/CoffeeChatProtocol>
- For faculty job searches:
 - <https://career.ucsf.edu/gsp/job-search/apply-faculty-positions>



Templates!

I. Introduction and thanks (2 min)

“Thank you so much for meeting with me. As I mentioned in my message, I’m currently [your current title] and am really interested in [their field or workplace]. I have lots of questions for you...”

II. Their history/transition story (5-10 min)

“...but could we start with just talking about how you moved into [their first relevant role]? What was that transition like for you? How did you decide that [their current workplace] was the right fit for you?”

- Ask follow-up questions
- Repeat back what you heard
- Frequently interest, curiosity, and appreciation

II. Their history/transition story (5-10 min)

“...but could we start with just talking about how you moved into [their first relevant role]? What was that transition like for you? How did you decide that [their current workplace] was the right fit for you?”

“That’s so interesting! So it sounds like you [summarize part of what you heard]?”

“It’s so interesting to hear that it was your non-research experience that made the difference. Could you say more about that?”

II. Their history/transition story (5-10 min)

“...but could we start with just talking about how you moved into [their first relevant role]? What was that transition like for you? How did you decide that [their current workplace] was the right fit for you?”

- Ask follow-up questions
- Repeat back what you heard
- Frequently interest, curiosity, and appreciation

III. Their current/future work (5-10 min)

Share + ask formula

“Thank you so much for sharing that! I also had some questions about your current work.”

- *Briefly* share something about yourself; something that’s important to you; or something you’re curious about; then ask a related question
- Inquire about future career trajectories
- Ask questions about work environment
- Inquire about routines, processes, skills they use at work
- Find out what they like and don’t like about what they do, or where they work

III. Their current/future work (5-10 min)

Share + ask formula

“Thank you so much for sharing that! I also had some questions about your current work.”

- “I really enjoy working on [X] and was wondering if that’s part of this kind of role. Could you tell me an example of the kinds of problems you’re solving at work day to day?”
- “I was reading about [X trend] and was curious if you see that affecting your [field, workplace, company]’s work in the next few years?”
- “[X kind of work-life balance] is really important to me in my next role. Is that something you think is realistic in this kind of work?”

More examples at: <http://tinyurl.com/CoffeeChatProtocol>

IV. Advice for your situation (5-10 min)

“This has all been so helpful. With the few minutes we have left, I just wanted to ask what advice you have for me as someone thinking about moving into a role like this in [your time frame].”

- More people you should speak with
- Groups you could join, events you could attend
- Other workplaces they'd recommend you consider
- Skills / experience you should gain
- Questions you should ask to determine a good fit
- What they would do in your shoes

IV. Advice for your situation (5-10 min)

“This has all been so helpful. With the few minutes we have left, I just wanted to ask what advice you have for me as someone thinking about moving into a role like this in [your time frame].”

- “I’ve been trying to figure out if I need to [do an internship / do a postdoc / pick up a new programming language / etc.] to be competitive for roles like this. Do you have any thoughts about that?”
- “Are there events for people in this field that a newbie like me could attend?”
- “I’m still learning about what [labs/companies/universities] might be a good fit for me. Are there other places that you’d recommend I check out?”
- “Talking to you has been so helpful. Are there any other [people in this field] who you I should speak with?”

V. Conclude and thanks (2 min)

“Thank you so much for taking the time to meet with me. You’ve given me so much great advice, and I’m definitely planning to [look into X / talk to Y / consider Z]. Would it be OK to keep you posted on how my search is progressing? Thanks! I hope you have a great afternoon!”

Write a thank-you afterward

A day or two later. This is really important for building trust!

“Hi [person], thanks so much for taking the time to chat with me. The [thing they mentioned] was so [interesting, helpful, insightful] and I [something you plan to do as a result]. Thanks so much again for taking the time, and I hope you [something about their personal or professional work that they shared].”

“Hi Sudha, thanks so much for taking the time to chat with me! The article you mentioned sounds like just what I was looking for, and I definitely plan to get in touch with Mark. Thanks so much again for taking the time, and best of luck on that big push with your new project this spring!”

Reach out again with updates.

“Hi [person], thanks so much for taking the time to chat with me in [date that you talked]. The [thing they mentioned] was so [interesting, helpful, insightful] and I [something you did as a result]. I wanted to let you know that [update on your status] so if you have any advice or would be willing to share any relevant opportunities, I’d really appreciate it! Thanks so much and I hope you’re doing well and [something personal they shared with you].”

“Hi Sudha, thanks so much for taking the time to chat with me in October! The article you mentioned was so helpful, and I was able to get in touch with Mark, who had some great suggestions too. I wanted to let you know that I’m graduating in two months and currently applying for jobs, so if you see anything that might be a good fit and would be willing to send it my way, I’d be very grateful! I hope you’re doing well and that your new puppy has settled in well.”

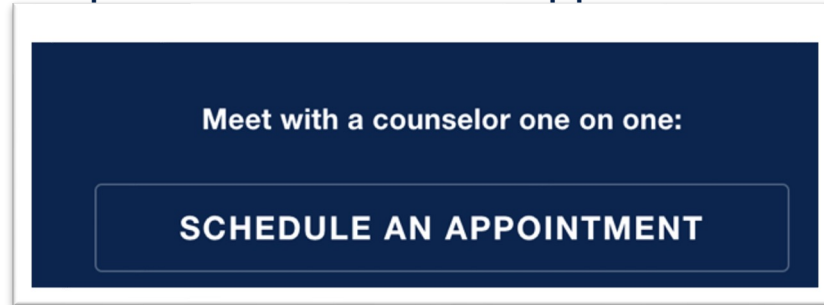
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Remember to connect with people you meet this month!

Find a mentor. Be a mentor. See: tiny.ucsf.edu/UCSFmentor

- **TBD:** UCSF Student and Alumni Mixer at Spark Social
- **Jan 22/23:** Choosing a Thesis Lab
- **Jan 30:** Mentoring Awards and Online Professional Profile Lunch and Learn
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And you can connect with us 😊 (Please add a note!)

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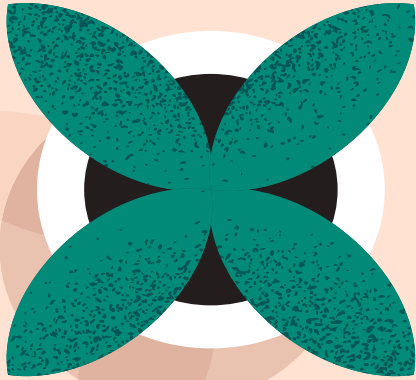


Jocelyne Fadiga

- PhD Candidate, Tetrad
- Intern, OCPD

Your feedback is greatly appreciated!

<https://tiny.ucsf.edu/CoffeeChat>



The Coffee Chat Protocol: Part II



Please stick around if you'd like to...

- Work on your request to connect or the questions you want to ask
- Get feedback from others on either of the above
- See a demo of how to find UCSF alumni on LinkedIn

Otherwise, thank you very much for coming – Your feedback is greatly appreciated!

<https://tiny.ucsf.edu/CoffeeChat>

Draft a “request to connect”

- Using one of the templates, draft a “request to connect.”
- Have a specific person in mind.
- Remember to find one or more specific points of connection or interest to emphasize (could just be your shared alum status, shared research interests, something you like about their lab/company/ university, etc.)



Breakout rooms (in 3s, 10 min)

- Each person: share your “request to connect” and ask for feedback.
- Do you feel ready to send? Why/why not? What would make you feel ready?

Brainstorm your coffee chat questions

- Imagine that the person you're considering agrees to chat.
- Using the templates, brainstorm a list of 5-10 questions you plan to ask.
- Remember to put them in order.
- Think about how you'll keep track of your notes for the meeting.



Your feedback is greatly appreciated!

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UCSF

