

# The Coffee Chat Protocol

Using Informational Interviews to Find Mentors and Opportunities

Ray Care, Program Director  
Office of Career and Professional Development

<input checked="" type="checkbox"/>	_____
<input checked="" type="checkbox"/>	_____
<input checked="" type="checkbox"/>	_____
<input type="checkbox"/>	_____
<input type="checkbox"/>	_____
<input type="checkbox"/>	_____
<input type="checkbox"/>	_____

## Welcome!

While you wait, if you'd like, say hi in the chat and let us know:

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 Consultants



**David Blancha, PhD**  
Assistant Director



**Ray Care, PhD**  
Program Director

## Peer Advisors



**Trase Aguigam**

- PhD Candidate, Tetrad
- Intern, OCPD



**Matt Arvedson**

- PhD Candidate, Biomedical Sciences
- Intern, OCPD



**Jaysón Davidson**

- PhD Candidate, Pharmaceutical Sciences and Pharmacogenomics
- Intern, OCPD




**Jocelyne Fadiga**

- PhD Candidate, Tetrad
- Intern, OCPD

# Our upcoming events

More information at [career.ucsf.edu/events](https://career.ucsf.edu/events)

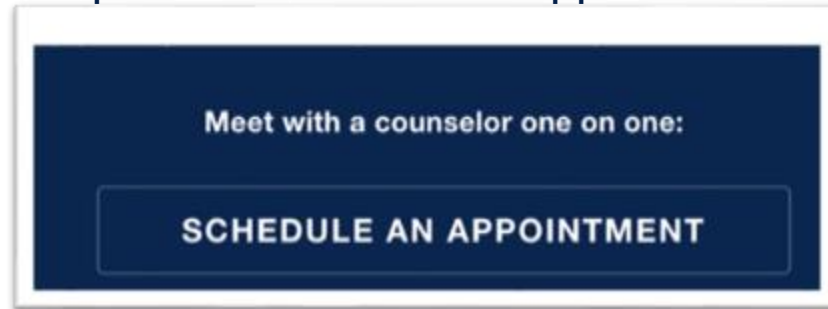
- ~~January 24: Office Hours~~ *cancelled!*
- **January 28: Agilent Networking**
  - Meet someone you might want to have a coffee chat with!
- **February 4: Office Hours**



Today's slides are on the event page  
(lots of templates!)

# Questions? Come see us!

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



# What we'll do today:

## Learning goals

- 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

## Activities

- Time for reflection
- Anonymous sharing via PollEverywhere
- No breakout rooms

## Questions during the session?

- Send your question to David Blancha, he will respond in the chat

What's a fear, concern,  
or question you have  
about how to have a  
coffee chat?

Answer at  
[pollev.com/raycare583](https://pollev.com/raycare583)



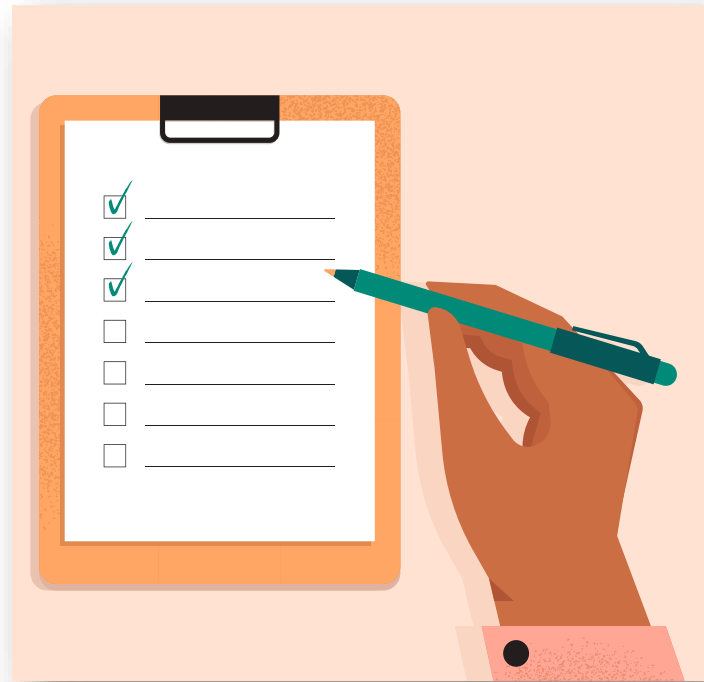


The best networkers are not born, but rather work very hard at developing their skills, investing both time and effort.

**Anand and Conger (2007)**  
Networking researchers



# 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 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

# 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](http://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?

Answer at [pollev.com/raycare583](https://pollev.com/raycare583)

- 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?

Answer at [pollev.com/raycare583](https://pollev.com/raycare583)

- 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
- 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).

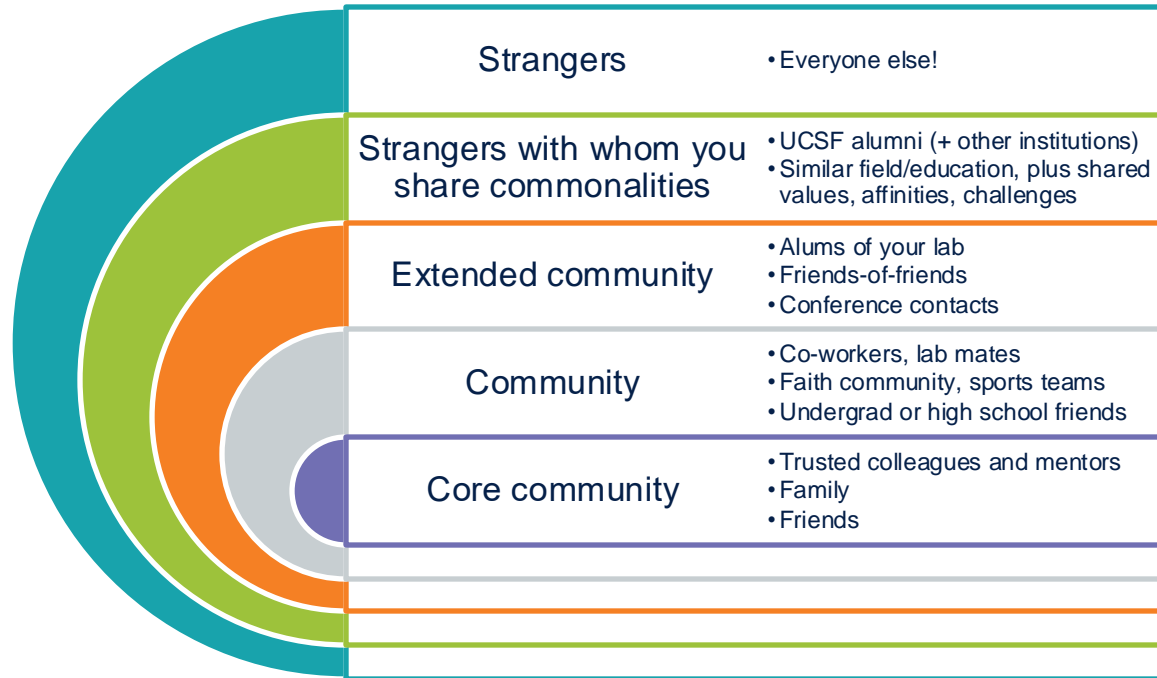


# The protocol for coffee chat success:



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

# We all have different kinds of relationships



# What the research says:

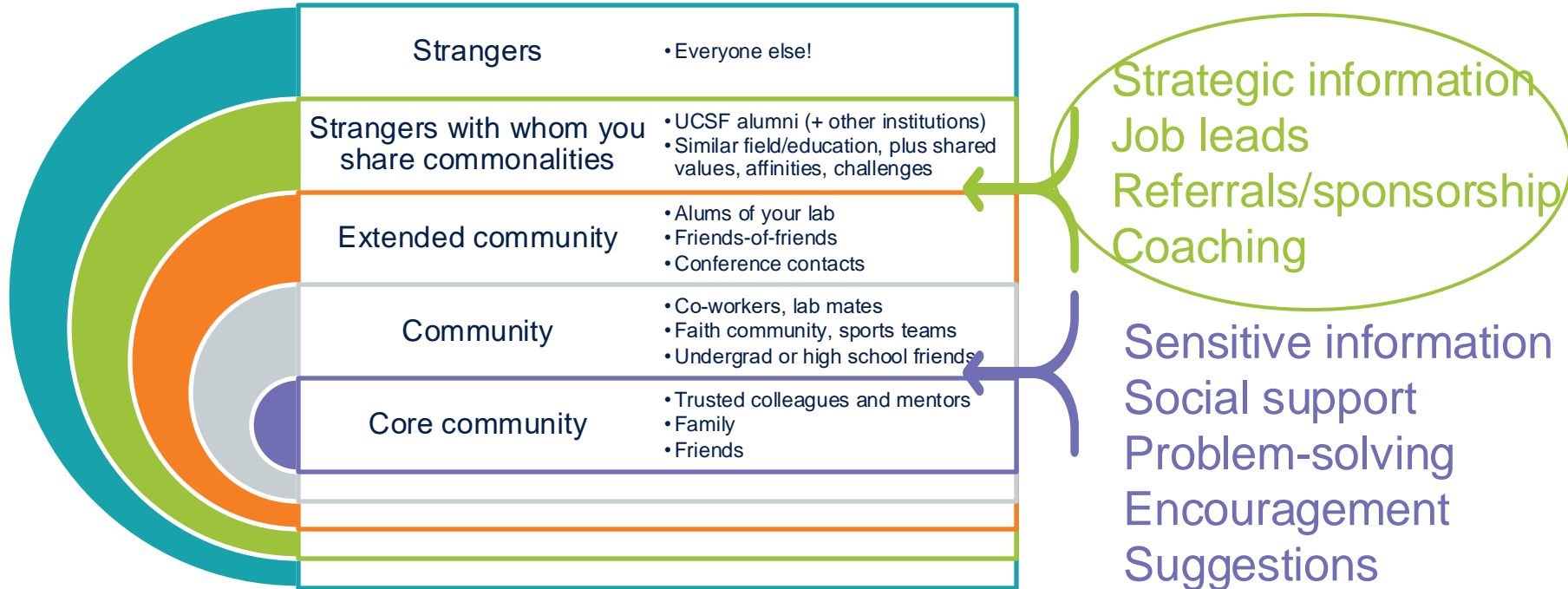
- **“Strong ties”**

- ***Core community and 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”**

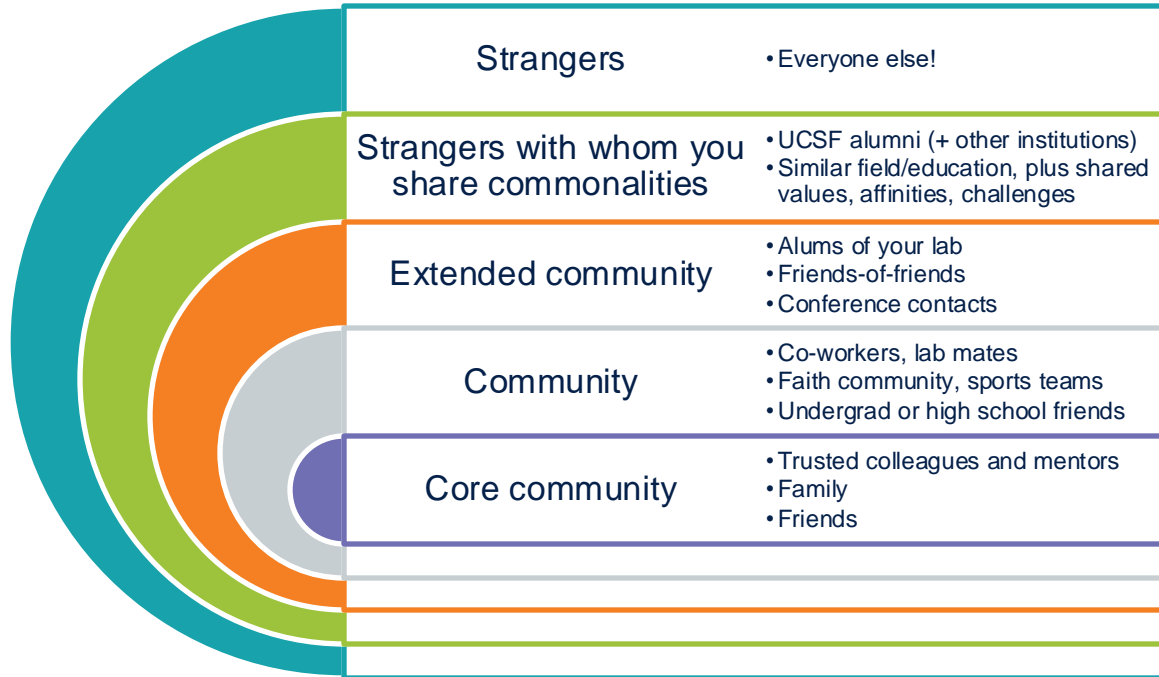
- ***Extended community and strangers with whom you share commonalities***
- More likely to offer job leads
- More likely to result in higher salary and job title
- More likely to be different from you

# 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**



“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 your 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 [redacted] I am applying for. Would you look at my [redacted] and [redacted]?”

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:

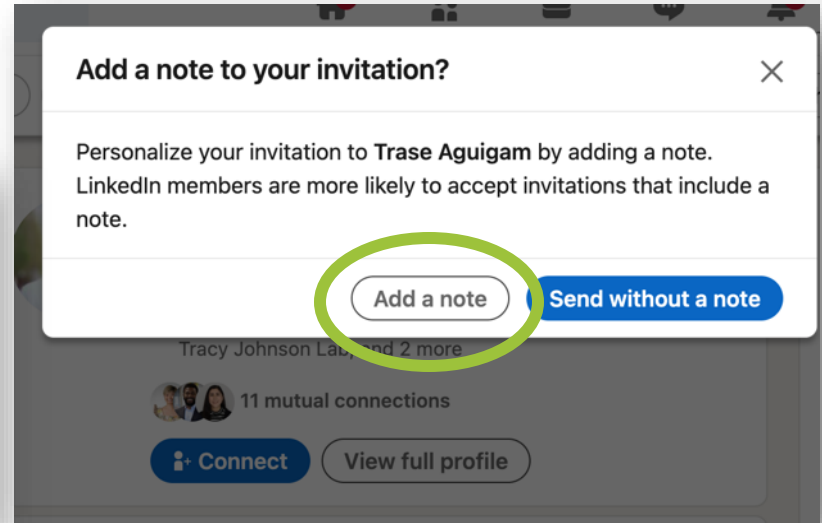
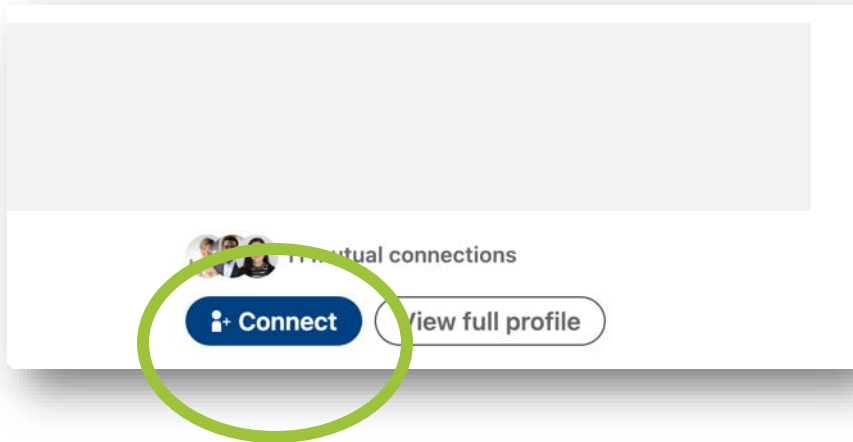
- **You didn't add a note to your LinkedIn request to connect** – then you are just a “stranger” not a “stranger with commonalities”
- **You asked for help in your message** – before the coffee chat, you're not yet a trusted “extended community” member, so focus on asking for advice.
- **You didn't explain 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.”

# 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.)



## 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**



# 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 job searches:
  - <https://career.ucsf.edu/sites/g/files/tkssra2771/f/wysiwyg/ResearchersPDFInformationalInterviews.pdf>
  - <https://career.ucsf.edu/gsp/career-exploration/build-your-professional-network>
- 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!”

# 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.

Share 1 or 2 of your questions  
anonymously at

[pollev.com/raycare583](https://pollev.com/raycare583)



# 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**

# 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.”

# The protocol for coffee chat success: Complete!

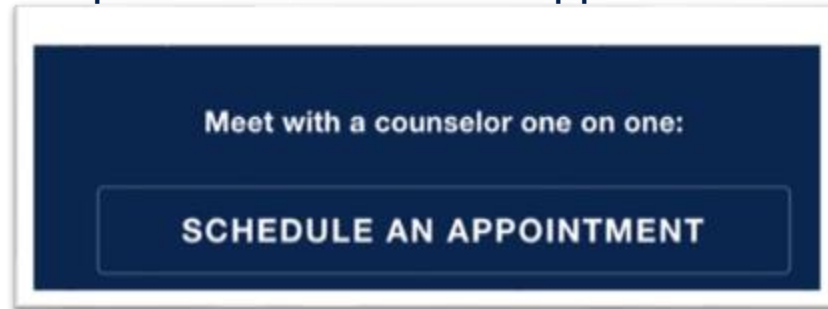


- ✓ Know your goal
- ✓ Ask for the right thing
- ✓ Reach out to the right people
- ✓ Reach out the right way
- ✓ Ask the right questions, in the right order
- ✓ Follow up

Your feedback is greatly appreciated!  
2-question survey at [pollev.com/raycare583](https://pollev.com/raycare583)

# Questions? Come see us!

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



# Remember to connect with people you meet this month!

- ~~January 24: Office Hours~~ *cancelled!*
- **January 28: Agilent Networking**
  - Meet someone you might want to have a coffee chat with!
- **February 4: Office Hours**

And you can connect with us 😊 (Please add a note!)

## Career Consultants



**David Blancha, PhD**  
Assistant Director



**Ray Care, PhD**  
Program Director

## Peer Advisors



**Trase Aguigam**

- PhD Candidate, Tetrad
- Intern, OCPD



**Matt Arvedson**

- PhD Candidate, Biomedical Sciences
- Intern, OCPD



**Jaysón Davidson**

- PhD Candidate, Pharmaceutical Sciences and Pharmacogenomics
- Intern, OCPD



**Jocelyne Fadiga**

- PhD Candidate, Tetrad
- Intern, OCPD



UCSF

