

# 4 Steps to Matching Mentors and Mentees

A formal mentoring program can be a powerful strategy to engage and develop employees within an organization. A study by the [Corporate Leadership Council](#) found employees who are most engaged at work perform 20% better and are 87% less likely to leave the organization. However, without properly matching mentors and mentees, a mentoring program may never reach this kind of impact.

So how can you unlock the full potential of mentoring?

In order to create a program that satisfies the needs of mentors and mentees, an organization must match the right participants together. No one wants to see mentees drop out, or mentoring relationships fizzle before they've even begun to engage in any real development. To provide your participants and the organization the best chance at success, follow these four vital steps to effective matching.

## Step 1. Identify the Purpose of the Mentoring Program

There must be clearly defined objectives for the mentoring program. For example, this could be an [increase in talent retention](#), an increase in employee satisfaction, or an increase in promotion rates for participants compared to non-participants. Without clear purpose, organizations often make large assumptions in the matching process, guessing what criteria makes sense to match on, as opposed to mapping it to the organizational goals for the program. This can lead to poor matches, dissatisfied participants, low engagement, and ultimately, a waste of time for the everyone involved.

Understanding the purpose of the program will help you establish criteria and determine the type of matching you'll want to use. It will also help formulate the [mentorship goals](#) and key metrics you'll collect in order to know if the program is successful. Identifying the goal of the program will be your guide post throughout the rest of the matching process.

## Step 2. Determine the Type of Matching for Mentors and Mentees

With the program's overall purpose in mind, it's time to choose what type of matching you'll implement in the program, depending on the needs of your organization. You can use a number of criteria to determine which matching will work best for your company, including:

- Requirements for mentors and mentees to participate
- Number of participants
- Amount of administration resources available to work on matching process
- How much say or influence you'd like to give participants in the matches

The preferences of the people involved should be an important consideration in this process. When participants have some say in the choice of their mentor or mentee, they're more likely to be invested, improving the chances the match is a good fit for both parties and beneficial to the organization.

Once you've determined your criteria, it's time to decide on your matching method. Today, there are four popular types of matching to consider:

### Self Matching Mentors and Mentees

This type of matching enables mentees to find their own mentors. It gives mentees a say in the process, allowing them to select a particular mentor or submit their top choices. This type of matching is useful for more generalized mentoring, can lead to better satisfaction of participants since they have more of a say in who they get matched with, and reduces overall admin burden.

## Admin Matching Mentors and Mentees

Empowering program owners to create matches on behalf of the participants is common among [leadership development](#) and [high-potential program](#) formats, where the organization has identified the specific participants and matches it wants in the program.

## Bulk Matching Mentors and Mentees

It permits program owners to match a large pool of program participants at the same time. It is a great time saver when the participant pool becomes larger than 200+, making it difficult for spreadsheets and personnel to manage. This reduces admin burden and time commitment. It is often used for a large career mentoring program.

## Hybrid Matching Mentors and Mentees

This is a combination of the previously mentioned matching types when one type alone is not diverse enough to fit the needs of a program. When matching 20 mentees with 20 mentors, finding the best match might be fairly straight forward.

But what happens when that number doubles, or triples? At a certain point, usually around 100 people, matching manually can become unmanageable and burdensome.

[Mentoring software can help programs streamline](#) this process in a couple of ways. Most mentoring platforms will use an algorithm that automatically suggests the best match by analyzing the data in each participant's profile. The right solution will enable you to match participants based on the factors your organization feels are most important to your program, such as location, department, seniority, etc.

## Step 3. Create Profiles and Criteria for Matching Mentors and Mentees

Mentoring participants will bring different competencies, tenure and organizational knowledge to the program. You'll want to make sure you're matching them on the right skill traits. To do this, mentors and mentees fill out rich profiles. Based on the objectives of the program, these profiles will contain elements to help create rich matches.

### Questions for Mentoring Participant Profiles

When crafting the right mentoring profiles, start with basic background topics such as:

- current position
- previous job experience
- educational background
- preferred pronouns
- location or time zone

Programs looking to focus on [increasing opportunities for underrepresented employees](#) can also include demographic questions for matching.

Additionally, questions regarding personal interests and hobbies can help to paint a more well-rounded picture of the candidate. In order to make good matches, it's important to gather information on what participants hope to gain/give within the

program. This can include questions such as:

- What skills would you like to improve upon within the mentoring program?
- What skills do you feel proficient in?
- What are your long-term goals for your career?
- What values and qualities do you think are important for a mentorship partner?

You'll also want the participants, especially mentees, to establish what preferences are important to them in a match. It might be tenure or skillsets. Robust profiles need to encompass a good range of information in order to make more informed matches. But keep in mind the profile shouldn't be too overwhelming for the participant.

## Step 4. Provide Training for Mentors and Mentees

Left to themselves, many mentorships will take off and thrive. But some may not. Why? Because typically, mentoring is not an inherent skill or part of one's daily routine. To ensure mentor and mentee progression throughout the relationship, you'll want to provide guidance.

Providing guidance and structure for participants is often overlooked. As [The Atlantic](#) explains, "...much of the problem with corporate mentorship programs is that they miss an opportunity to create a formal, structured path for mentors and mentees."

Educating them on how to best conduct meetings, provide constructive feedback, and stay on track with individual goals will provide guidelines for the pairs to follow as the mentorship grows. Offering [training and resources](#) to help your participants initiate and facilitate their mentorships will make for more impactful relationships long term.

When it comes to formalizing and scaling your mentorship training efforts, [formal training like Chronus Courses](#) can lend a helping hand in creating structure and accountability for training, while allowing embed-able resources, lessons and

quizzes — all customized for self-paced learning and development.

## Fixing a Poor Mentorship Match

However, sometimes mentoring matches simply don't work out. Whether due to conflicting busy schedules, disengagement or confusion, the key is to act quickly and have a protocol in place. It's important to support both parties and quickly offer a new match while getting feedback so that everyone can learn from the experience.

## Overcoming Mentoring Challenges with Software

[Mentoring software can automate the matching process](#), resulting in more successful matches in much less time. Using software allows you to calibrate the process so that the most important criteria have the most weight in matching results, for example, while creating a consistent set of rules across the board. Automating also frees administrators from what can be a very time-consuming job. As your program grows, it's important to understand how you're making the most of your time, effort and effectiveness.

## Conclusion

The power of mentoring within an organization can [increase retention, enable development and build a stronger leadership bench](#), but not if you get off to a rocky start from the beginning.

Don't overlook the importance of a good match. Increase your chances of success by taking a structured, proactive approach now, so you can see positive impact in the future.