How To Match Mentors and Mentorees

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Mentoring Works!
Introduction

Frequently, we hear glowing comments from mentorees like: “I was so well matched!” and “I can’t imagine this working so well with a different person”.

How do you get good matches and what do you do when it doesn’t work?

This ebook describes three strategies and offers a checklist of matching criteria. We’ll talk about how to manage the critical early stage so that partnerships work, and setting up exit strategies in case they don’t.

With ever-increasing demands on the time of already busy people it is crucial that you understand what makes a good mentoring match.

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About Me

I started nearly thirty years ago, in the finance sector. In the eighties, I began helping senior managers who were retrenched to move on in their lives and build new careers. In 1994, I began to focus on mentoring as the key strategy for people who want to progress their careers. I’ve been helping organisations design and implement mentoring ever since. I have worked with mentors and those who are mentored in Australia and overseas. I have reviewed many mentoring programs and seen what works and what doesn’t. My own professional development and education has been ongoing for three decades. I speak about mentoring at international conferences, I train mentors and those who are mentored and provide consulting services and resources to support mentoring programs and relationships. I’ve written a dozen books on mentoring - not including these short ebooks that I call flashbooks, which are concise written versions of my webinars.

Some mentoring programs that I have been involved in recently have:

- helped build safer workplaces;
- increased profitability in small businesses;
- helped retain young recruits and helped equip mature workers to assist in their development;
- contributed to equity for Aboriginal employees and improved services to Aboriginal clients;
- provided career development and leadership skills; and
- increased operational consistency.

If you are planning or implementing a mentoring strategy and feel I could be of assistance, please contact me: email ann@mentoring-works.com or in Australia phone 02 43422610.
Mentoring Strategy

As you’ll see in my model on the next page, four key elements must be addressed in a mentoring strategy:

1. **Planning** - producing a blueprint that clearly ties the strategy to important outcomes and maps out how they will be measured;

2. **Promotion** - your ability to communicate so that the value of mentoring is recognised and welcomed by stakeholders;

3. **Preparing** - training and equipping participants to succeed in mentoring; and

4. **Program Support** - a structured program that includes ongoing assistance, follow-up and feedback.

When you plan and promote mentoring, prepare people for their roles and provide support, you increase the likelihood of success.

A critical step is working out how to put the mentor and mentoree together.
Plan Mentoring

- Identify strategic objectives
- Analyse needs of target group
- Engage stakeholders
- Determine evaluation criteria and methods of monitoring and gathering feedback
- Produce a blueprint that clearly ties the strategy to important outcomes, details communication, training and evaluation and specifies activities, resources, logistics and schedule.
- Select a program coordinator and delegate responsibilities.

Promote Mentoring

- Two-way communication promoting the strategic and personal value of mentoring to all stakeholders.
- Attract and engage participants.
- Keep managers informed and supportive.

Prepare Participants

- Select and match participants.
- Provide information, guidelines and resources.
- Train and equip participants to succeed in mentoring.

Program Support

- A structured program to maintain engagement, including:
  - Ongoing communication
  - Resources and activities
  - Networking opportunities
  - Assistance and follow-up
  - Monitoring and feedback.
Specify Objectives

Making good matches starts before you get your participants on board because who you match with whom depends on the aims, focus and objectives of mentoring.

As you can see in the diagram (above left), you need to identify what the needs of your organisation are - what are its goals? Where are its pain points? Then you need to show how mentoring can add strategic value. This will help you decide on the focus of mentoring - who should you target as mentors and mentorees and what is the broad purpose of the mentoring? From this analysis you can determine the specific outcomes you want to achieve and how you will measure results.

Case Study - in the example on the next page, the organisation needs to comply with new equity reporting requirements that came into effect in 2012. This means showing results, not just listing plans and programs. Analysis of the results of diversity strategies in other organisations reveals the potential to avoid skills shortages, become an employer of choice and lower recruitment costs. All of which are highly valuable to the organisation.

In further research of the topic, a vital statistic is discovered: organisations who have more women at the most senior levels outperform those who don’t by 30-40%! So targeting high potential women for leadership development is a no-brainer. Mentoring becomes part of a strategy to get more women in the leadership pipeline, help women transition to senior roles, retain talent and attract more females to apply for positions. Measuring current numbers and comparing them to figures after the program will indicate results. Mentors in this case must be men and women who are experienced senior leaders themselves.

I recommend you pause now and work through the six areas in the model for your own situation.
Specify Objectives

Aims
- Equity Outcomes Reporting
- Avoid skills shortage
- Employer of choice
- Lower recruitment cost

Focus
- Women
- Developing Leadership Potential

Objectives
- More women in the leadership pipeline
- More women in senior roles
- Greater retention of talent
- More female applicants
- Before and after measures
Matching Methods

Once you have identified your target groups, you have to choose the matching method and there are basically three choices:

1. Match-make
2. Set and search
3. Populate a pool

Or, a combination of all three.

Match Making

The most common form of partnering involves a systematic sort through information submitted by potential mentors and mentorees to make the match.

Whether a manual system, where organisers physically review applications, or software is used to match, you’ll need to think through selection and matching criteria. Criteria depend on the purpose of mentoring, and the nature of the participants.
Successful Match-making

Secrets to successful match-making are:

**Participants volunteer** – if they want to be involved they’re more likely to make it work;

**Nominations** – invite mentorees and managers to identify potential mentors and mentorees, approach the nominee and make sure they are willing before you accept their application.

**A Recruitment and Selection Process** – advertise and select participants using a process similar to employment, ie written applications and if possible, interviews. Set this up as if you were hiring for a key role. Because you are!

**Right of refusal** – check with both parties and if they have good reason (you don’t need to know what it is) let them opt out of a proposed match.

**Facilitate first contact** – the best way to ensure pairing works is to provide non-threatening, even fun activities ideally, with other mentoring pairs. This is one reason that workshops are so useful at the beginning of mentoring. Participants learn the skills and structure of successful mentoring together. Group activities break the ice and stimulate networking.

**Early Opt Out** - build in, at an agreed point, the opportunity for pairs to stop and review their relationship and indicate whether they will commit and continue or opt out. Decide if you have the resources and want to rematch those who opt out.
Selection Criteria

What’s the first thing you need if you’re hiring someone? A job specification. So, part of the mentoring recruitment and selection process will be defining and documenting the role of mentor and mentoree. This will help you develop selection criteria too.

Recruiting Mentors is the subject of a separate webinar and flashbook, available from the webinars page on our website www.mentoring-works.com. So here I’ll just talk about selection criteria for mentors.

• Mentoring should be voluntary, so only select people who want to be involved.

• Time is an issue, most people are busy. So only choose people who are accessible and are willing and able to make time for mentoring. The more senior people are the more difficult this can be.

• Mentors are role models, so pick people who exemplify the values you want mentorees to pick up.

• Mentoring involves more listening than telling. Make sure your candidates understand that and have, or can develop, the skills.

• Think about the expertise and experience that will match mentoree’s needs. Sometimes depth of experience is needed but other times it’s breadth.

You need to add selection criteria relevant to your situation to this list.
Selection Criteria

So what do you look for in mentorees? Well, think back to the aims, focus and objectives identified earlier. In the example I gave, the target group were women and the purpose was developing leadership potential. So we need to clarify what might indicate women have high potential for leadership.

Amongst other things, I’d be looking at their:

**Desire** - do they show positive interest in senior roles?

**Credentials** - have they shown leadership qualities on or off the job?

**Self development** - have they taken the initiative to further their education, skills development and experience?

**Career progress to date** - what have the done? Do they have a depth or breadth of knowledge relevant to leadership?

What selection criteria make sense in your situation?
Matching Criteria

Here are some things to take into account when matching:

**Mentoree’s needs = Mentor’s expertise/experience** - it’s pretty obvious that you need to match a mentoree’s needs with the experience or expertise of a mentor. However, mentorees don’t always know what they need and sometimes what they think they want is not what they need. So, to make this work you need to: educate people about mentoring before they apply; help them determine realistic expectations; and, provide some ways for them to self-assess their needs.

**Off-line** - the mentor is usually not in a direct line of authority above the mentoree. This reduces conflict of interest and potential difficulties with the mentoree’s manager (you wouldn’t want the mentoree’s manager’s manager as the mentor for example). Someone a step away is better placed to be objective.

**Location** - people often say that being far away geographically is a problem because they want to meet face-to-face. Although there's no doubt meeting is valued by participants, a lot of very successful mentoring happens without it. Technology allows people across the world to develop and maintain relationships. I like to get people together at the beginning, middle and end of a program. Then if they can meet, great; if not, there are plenty of alternatives that will work if they are willing to make the effort.

**Common/Different** - it’s easy to build rapport when you have a lot in common with someone else but it’s working with people different from you that allow you to stretch and learn. Educate people to value diversity, facilitate some ice-breaking that allows them to find what they have in common. Make matches where people have some common ground and plenty of difference.
Set and Search

A lot of what I’ve covered about match-making applies to the other two methods, set and search and populate a pool.

“Set and search” is a method that equips mentorees to find their own mentor.

**Case Study** - one of my clients uses the “set and search” method with graduates. Gen Y like to be self-directed and have input to the selection of their own mentor. So what we do, is bring them into a one-day workshop that overviews career strategies, strengths based development and the value a mentor offers. There’s lots of group work and participant generated action plans. They each complete Myers-Brigg Type Indicator (an instrument that provides insight about personality) and learn about the challenges and benefits of communicating with people like them and different from them. Although the focus is on personality, there is a strong underlying message about differences of all kinds. Then we help them think through what to look for in a mentor and plan how to find one.

They are ready and set to search. The idea is that they find and approach a potential mentor and then both attend a pairs workshop a few weeks later. There is an in-house coordinator who can help them find or approach a mentor if they need it.

If you use this method, you need to ensure that your program has a good profile within the organisation, that there is plenty of accurate information available to prospective participants, and mentoring is visibly supported by senior management. So that people are primed and welcoming if mentorees approach them. You want mentors to feel that it is an important and valued contribution that they will make.
Populate a Pool

This method means you gather plenty of potential mentors and make them available for mentorees to choose. The mentors have been selected and primed, briefed and skilled up.

To do this, you **promote your program**. Make sure there’s a real buzz and it’s attracting a lot of positive attention.

You then call for **expressions of interest** from potential mentors. Use a recruitment and selection process as described earlier.

**Train** the selected mentors (for senior people you might call it a management briefing). You have to make it clear what the role is. Mentoring is not management, and it’s about listening and questioning, not telling etc. You may in fact use the workshop as part of selection – you may see some people who just don’t get it when it comes to mentoring. Some people are just unsuitable as mentors. Others don’t show enthusiasm and should not be included in the pool.

You’ll need to **manage** the response to those who are not selected.

Mentorees must then be able to **access** the pool. So you need a way to make information about potential mentors available - online is easiest. You also have to decide how mentorees can indicate their preferred match and how you’ll handle it if more than one person wants the same mentor.

You will want to **register matches** once they’re finalised.
Exit Strategy

People always ask: “what if it doesn’t work?” So you need to work out exit strategies even though you may never need to use them.

I recommend that you adopt a “no fault” approach that let’s people opt out easily. Participants are very reassured to know this is the policy right from the beginning.

Let them know you’ll check in with them after their first meeting. When you do, see how happy they are with the match. I’d encourage them to persevere if they haven’t yet warmed to their partner and make sure they have agendas and structure for their meeting. People don’t have to be best friends to have great mentoring relationships.

Be available to help resolve any issues that arise or advise on ways pairs can handle any problems.

Get each pair to schedule a review meeting 3-5 meetings in, where the only item on the agenda is how the relationship is going and whether they will commit to continue or conclude it. Check in with each of them at an appointed time to make sure this has happened.

If pairs do decide to discontinue reinforce the “no fault” philosophy. If you have the resources to do so, and they want to, rematch each person with a new mentor or mentoree.
Checklist for Matching

- Program aims, focus and objectives
- Specify target group of mentors and mentorees
- Choose matching method
- Promote mentoring - make it magnetic!
- Set up a recruitment and selection process, as if you were hiring for a key role.
- Selection criteria
- Matching criteria
- Right of refusal
- Facilitate first contact
- Train participants
- Mentor & Mentoree review to commit/opt out
- Manage early stage
- No-fault exit
- You are available to help
No matter how sophisticated your matching system is, these are the things that make mentoring work:

**Desire** - both parties genuinely want to be involved;

**Good will** - they have positive intentions and want to make it work;

**Rapport** - they have, or can find, enough in common. They have skills or attitudes that enable them to respect one another, regardless of difference;

**Communication** - they both have the ability to listen well, ask good questions and to be open and share thoughts, opinions, ideas and experience.

**Time** - they are able to make mentoring a priority. Commit to the relationship and give it the attention and energy it deserves.
Can we help you?

At Mentoring Works we help you create mentoring conversations, relationships and programs that work. We offer:

**Presentations and workshops** tailored to your requirements;

Your own **online community** - secure interactive networking website for exclusive use of mentoring participants with discussion forums, Q&A, and resource centre

**Webinars** - interactive, live learning where people can hear and see the presentation, ask and answer questions from a computer connected to the internet. These can be recorded for later viewing;

**e-learning portal** - audio-visual tutorials available 24/7 online with worksheets to download;

**Audio-visuals** available on iPhone, iPods, iPads and computers;

**Podcasts** - recorded audio accessed via mp3 players or burned to CDs;

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We have extensive experience and a comprehensive range of resources.

**Contact Us**

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Recruiting Mentoring (webinar & flashbook)
Mentoring - Maintaining The Momentum (webinar & flashbook)
Evaluating Mentoring (webinar & flashbook)
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