

MENTORING PLATFORM

Quick User Guide



MentorLead

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Introduction

The goal of this Quick User Guide is to provide basic direction. Each mentoring platform is customized for the organization or each program, therefore options will vary.

NOTE: Not all these features are available to all mentoring programs, for example, some mentoring programs manage the matching for their participants in which case the Search & Connect option will not be relevant to you.

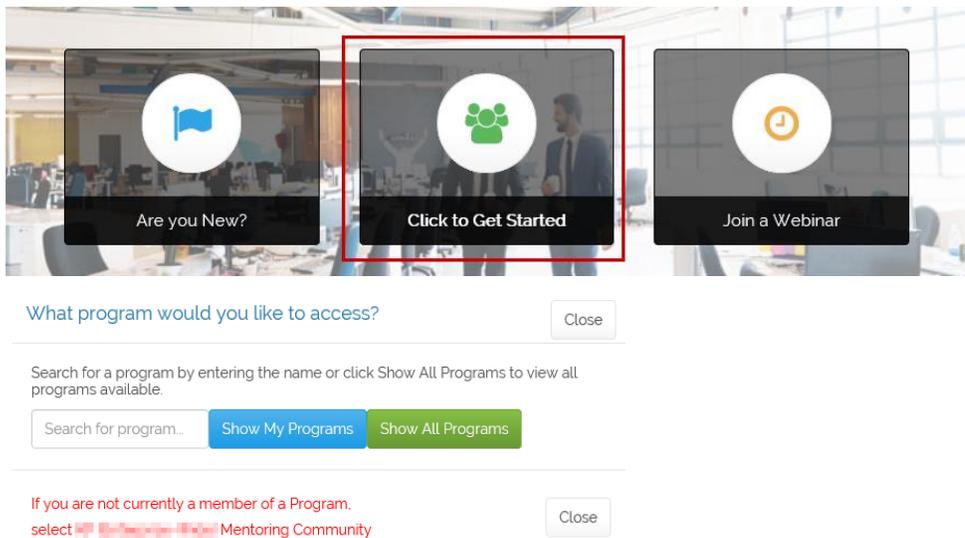
How the Platform Works

The mentoring platform houses a combination of many different mentoring programs. Typically, there is a Community (Enterprise Wide) Mentoring Program where all participants within the mentoring platform have access to each other. However, this is not always the case. In addition, there are other mentoring programs established to achieve specific organizational objectives. These programs may or may not be open for all participants. Select the Info button, on the program welcome page, to learn more. Each mentoring program has a different profile and access to different resources.

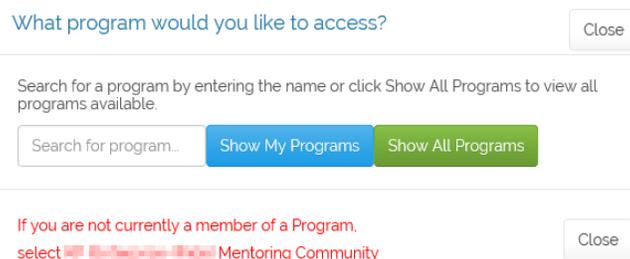
How to Access Programs

There are 2 ways to access Mentoring Programs:

- 1) **Mentoring Platform Welcome page:** Select the middle icon “Click to Get Started” or “Select Your Program”, and a popup will appear.
- 2) Search for a program by name or by selecting a name from the options in the dropdown menus under “Show My Programs” or “Show All Programs”



- 3) **Program Welcome/Home page:** Select “View other Programs” from the top navigation toolbar and a popup will appear. Search for a program by name or by selecting a name from the options in the dropdown menus under “Show My Programs” or “Show All Programs”



How to Navigate a Program



1. Top Navigation Toolbar

- **Home:** takes you back to the Program Home page, as seen above
- **Getting Started:** outlines the steps to get started in that program
- **Search:** dropdown list of Search options.
- **Resources:** dropdown list of all Resources available for that program
- **View other Programs:** opens the window to navigate to another program

2. Middle Navigation

- **Resources:** takes you to the Resources landing page with options
- **Mentoring Log:** takes you to your log to track/manage your relationships
- **Search & Connect:** takes you to the Search landing page with options
- **My Account:** dropdown offers you immediate access to your Profile, Email Notifications, Participant Summary, and Help/Suggestion box

NOTE: Each mentoring program is customized, therefore the options on the top of the navigation toolbar and in the middle of the page can and will vary for each program.

How to Access Resources

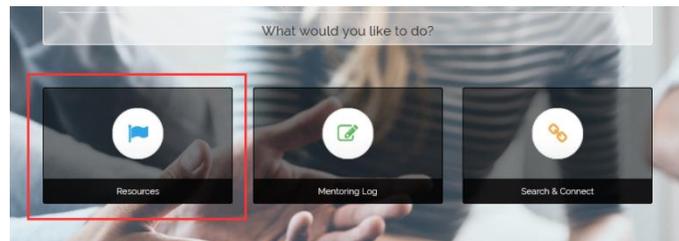
The Resources page offers you a variety of tools to support your experience in the program and with a mentoring partner. Example: Materials, Log, Goals, and a Calendar.

There are 2 ways to access Resources:

- 1) From the top navigation toolbar, select “Resources” to go directly to the Resources landing page or to select a specific resource from the dropdown menu



- 2) From the Program Home page, select the **Resources** icon.



From the Resources landing page, select an icon for any resource you want to access:



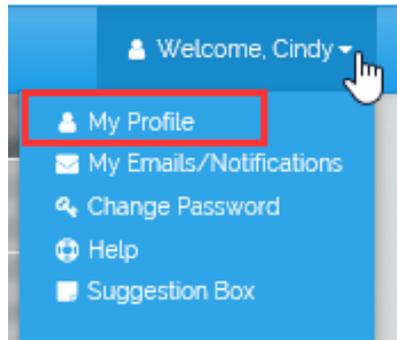
Note: There are a variety of resources available to your specific program depending on which ones your program’s leader has decided to make available to you.

How to Access Your Profile

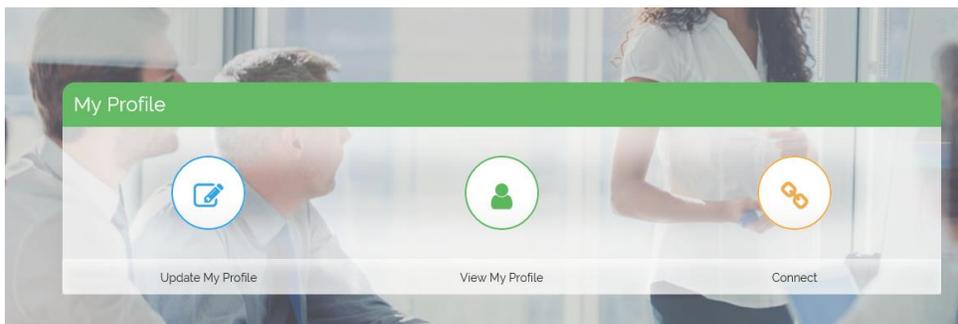
Program profiles can vary from program to program. It is therefore essential that you review and update your profile in each program.

You can Access your Profile from:

1. The top navigation bar: select **My Profile** from the **My Account** option



2. From the **My Profile** page, you can update or view your profile

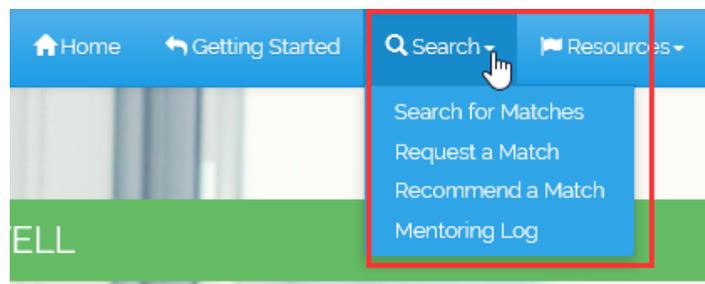


How to Search & Connect

If you are participating in a program that allows you to search, connect, and match yourself with a mentoring partner, then you will have access to the Search and Connect options.

There are 2 ways to access Search & Connect options:

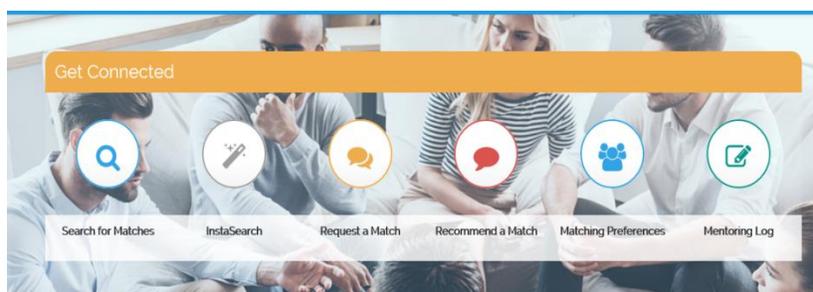
- 1) From the top navigation toolbar, select “Search” (sometimes called “Connect” or “Match”) to go directly to the Search landing page or select a specific search functionality



- 2) From the Program Home page, select the **Search & Connect** icon.

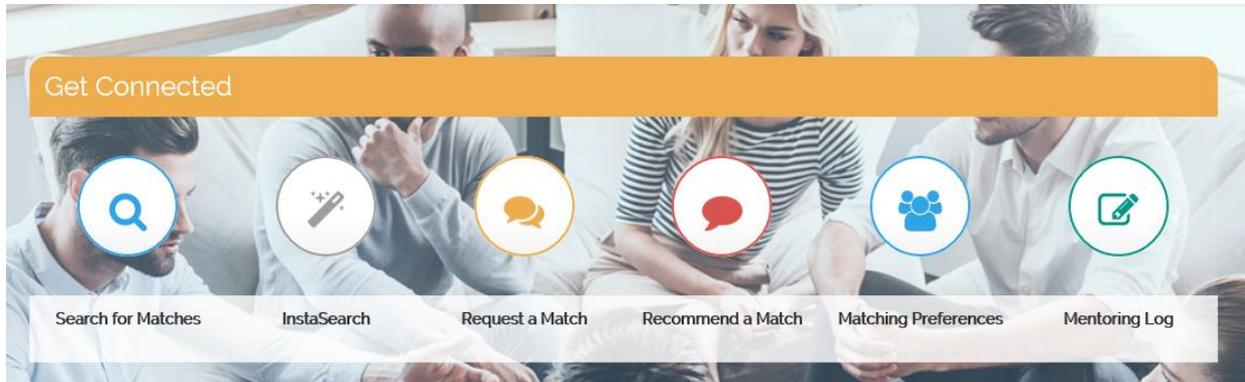


From the Search & Connect landing page, select an icon for any search functionality you want to use:



Ways to Get Connected

Programs offer a variety of ways to get connected. Below is a description of the two most common ways to Search and Connect with a Mentor or Mentee.



Search for Matches

Most items listed on a profile can also be used to Search for a Mentor or Mentee.

1. Choose a Mentor or Mentee.
2. Enter search criteria by entering text, selecting options from the drop downs or checking the boxes.
3. Hit “Search”

4. The Search results will look like this:

Search Results

1. **View Details:** click to open more information about the search
2. **Participants name:** click to view their profile and learn more about them
3. **Compare Profiles:** click for a side-by-side comparison of your profile and the profile of that potential match
4. **Request a Match:** click to open a page to send an email to connect
5. **Revise Search Criteria:** click to update your search criteria
6. **New Search:** click to start your search again from the beginning

Search Results For Community

The screenshot displays a search results interface for a community. At the top, it shows 'Showing 185 matches'. Below this, there are four search result cards. The first card is for 'Lesley Business' and includes a 'View Details' link, a 'Matched 100% of the search criteria' status, and a 'Matched Criteria' section with filters for 'Searching For' (Mentor) and 'Job Level' (Team Leader/Supervisor). It also features 'Compare Profiles' and 'Request a Match' buttons. The second card is for 'Lesley Business' and includes a 'View Details' link and a 'Matched 100% of the search criteria' status. The third card is for 'Lesley Business' and includes a 'View Details' link and a 'Matched 100% of the search criteria' status. The fourth card is for 'Lesley Business' and includes a 'View Details' link and a 'Matched 100% of the search criteria' status. At the top right of the interface, there are 'Revise Search Criteria' and 'New Search' buttons. Numbered callouts 1 through 4 highlight specific elements: 1 points to the 'View Details' link on the second card; 2 points to the participant name 'Lesley Business' on the first card; 3 points to the 'Request a Match' button on the first card; and 4 points to the 'Revise Search Criteria' button at the top right.

Tips for Search Results

If the search is generating a limited amount of results or none, consider limiting the search criteria to 2 or 3 key elements.

Still no hits? Consider reaching out to someone else within that department and/or location and ask if they know of someone who might be available to connect with you.

Request a Match

Request a Match is used when you already know the person's name.

1. Select a role for the connection: Mentor or Mentee
2. Type the person's last name in the drop down, this will provide a list to choose from
3. Pick the duration you are seeking for the connection
(ex: a quick conversation, an exploration, 1 month, 3 months, etc)
4. Enter a message to let the person know the reason for your request to connect
 - Your message will be included in the email communication that is sent to the person you are inviting to connect
5. Hit the **“Request a Match”** button

Request a Match

Request a Match with a Mentor Mentee

Request a Match

I am requesting a match...

To mentor this person

To be mentored by this person (to be their Mentee)

(Names will appear when you start typing in this box. Search by last name)

I would like to work together in this mentoring relationship for

(This duration can be changed or terminated at any time in your My Log section)

Why are you interested in connecting with this person?
(this will be emailed to them - minimum of 25 characters)

Recommend a Match

Use this tool to introduce two people who would work well together or use it to create a buddy match for a new or transitioning employee.

1. Select the Mentor's name from the first drop down
(hint: type the last name to move the list down quickly)
2. Select the Mentee's name
3. Pick a duration from the drop down
(this is optional)
4. Progression emails: determine if you'd like both participants to receive regular emails throughout the connection to remind and guide them
5. Why text box: add a brief message to the participants letting them know why you are connecting them
(this will be included in the email that the system sends to the participants)

Recommend A Mentoring Match

Recommended Mentor

Recommended Mentee

Optional:
I would like to work together in this mentoring relationship for

This duration is Suggested Required

Send these individuals [progression emails](#) with this relationship

Why are you interested in connecting these two people? (this note will be sent to them in the email)

How to Manage Your Mentoring Relationships: The Log

The Mentoring Log is the place to manage all of your connections and mentoring relationships in each program.

Your connection's role is indicated on the left-hand side of the box.

Mentoring relationships can be confirmed, declined and ended (if permitted) in the Log.

You can also use the Log to send Messages, complete/sign your Mentoring Agreement, take Notes after a conversation, set Goals, track Hours.

