

Manage Momentum:

Program Comms Playbook



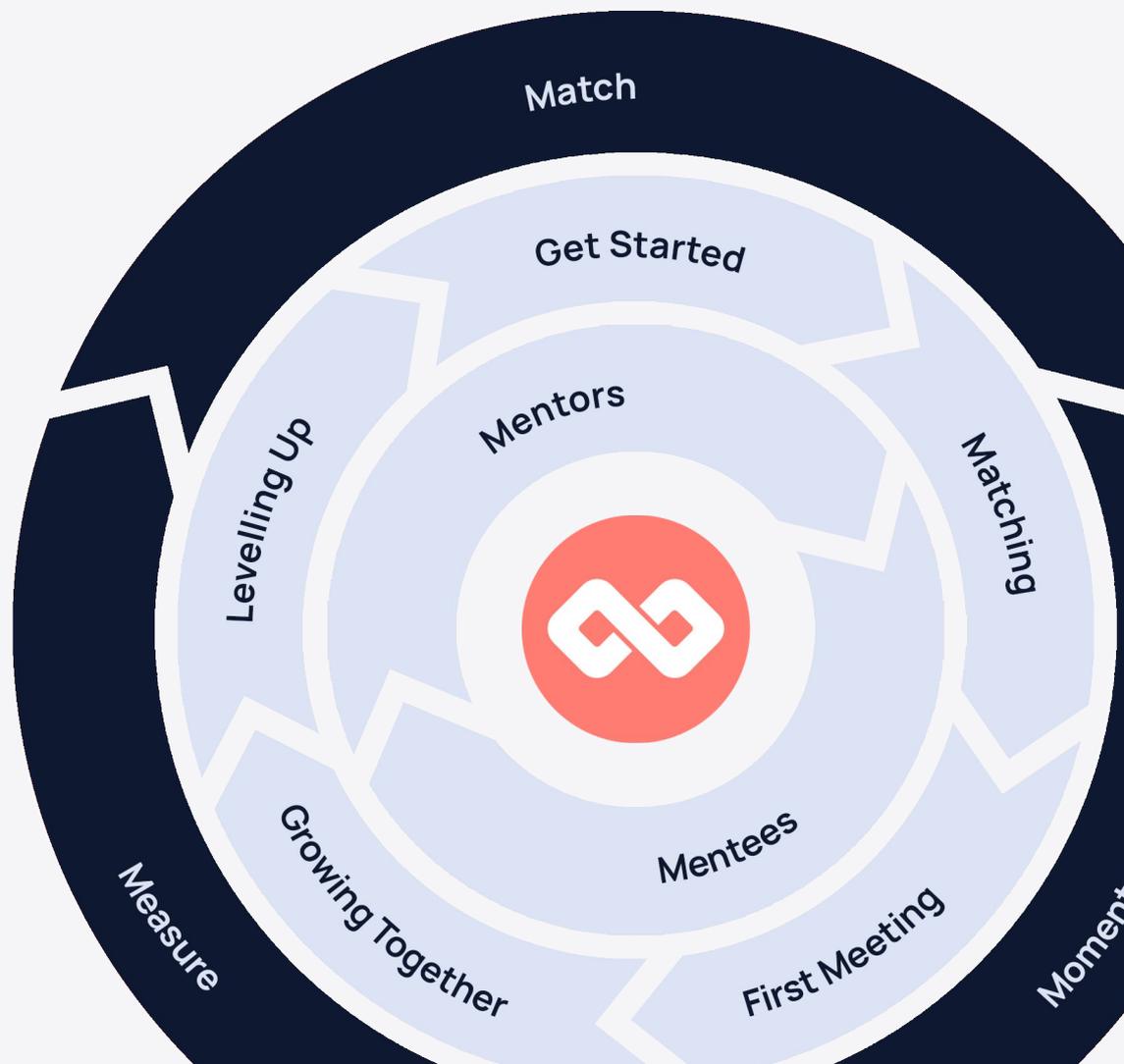
Mentorloop

Contents

Manage Momentum: Your Program Comms

- [Re-launching your Program](#)
- [Encouraging Milestones](#)
- [Sentiments](#)
- [End of Program](#)

**Click on the chapter titles to go straight to them!*

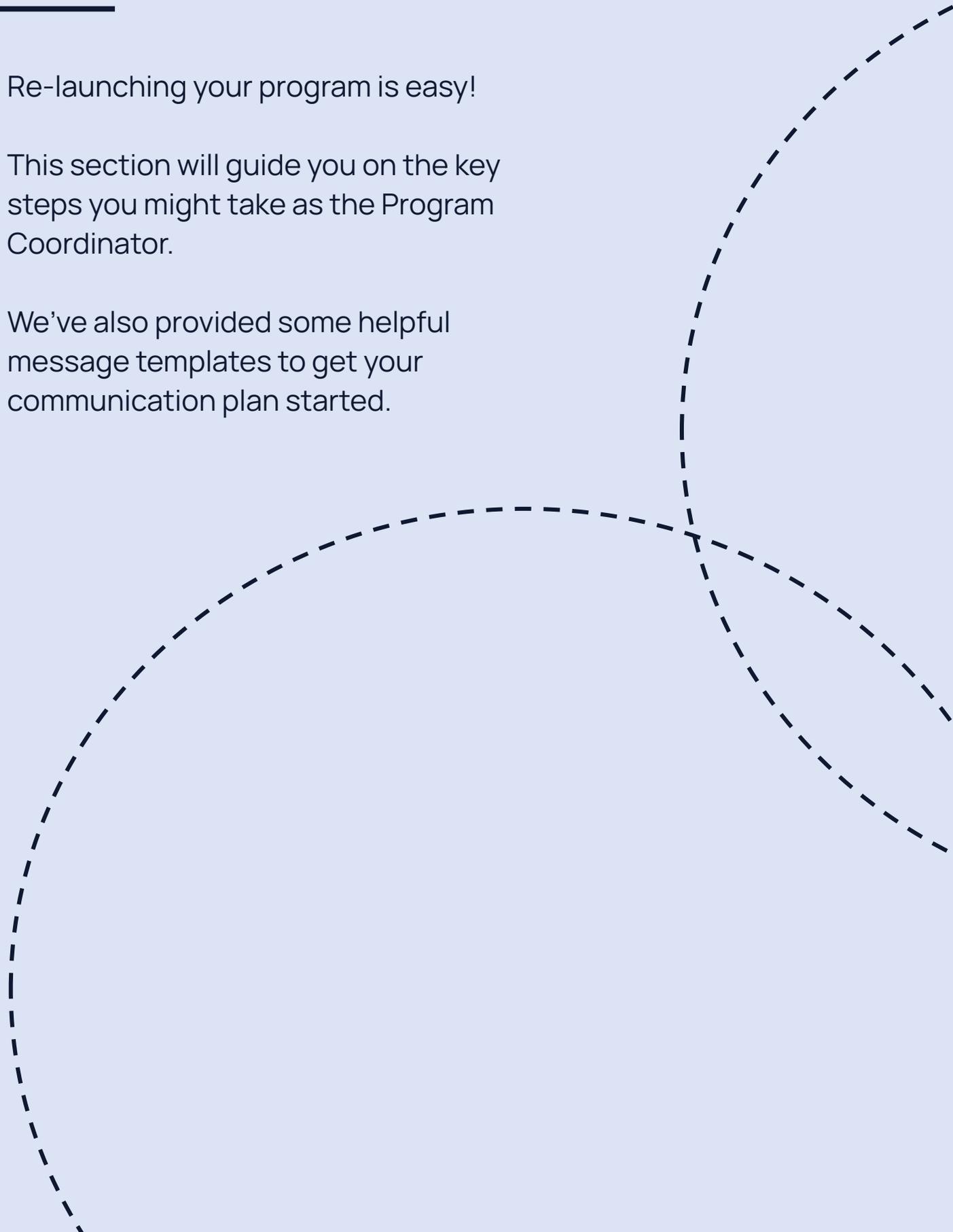


Re-launching Your Program

Re-launching your program is easy!

This section will guide you on the key steps you might take as the Program Coordinator.

We've also provided some helpful message templates to get your communication plan started.

A decorative graphic consisting of several dashed lines. One line starts from the top right and curves downwards. Another line starts from the bottom left and curves upwards. A third line starts from the bottom right and curves upwards. These lines intersect and create a sense of movement and flow on the page.

Key Steps

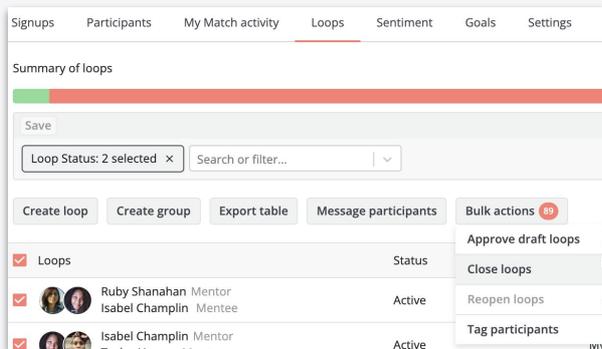
Re-launching made easy!

Consider which of these steps are relevant for you.

In the following pages, we also share sample copy for your comms plan.

1. Closing Loops

Existing loops may need to be closed before you relaunch your program with new matches. Doing so is easy, directly from the Loops Tab. See our [help resource](#) for detailed instructions.



2. Recruitment

Relaunching is the perfect time to recruit for new participants! Not sure where to start? We have you covered with our [Program Marketing and Recruitment Guide](#). This resource has all you need to get started, including communication templates.

3. Removing participants

If your program is run in cohorts, you may need to remove people before re-matching. You can do so directly from the 'Participants Tab'. See [this resource](#) for guidance.

4. Communicate about matching

Whether you're manually matching, encouraging participants to self-match, or letting our algorithm take care of it – it's useful to update participants on when, and what they can expect.

5. Match your participants

It's time to match! Find tips on creating [manual matches](#), or reach out to your Account Manager to schedule Automated Algorithm Matches.

Closing Loops

Inform participants that you will be closing loops and rematching them! Consider giving them an opportunity to take a break from the program.

Hi,

{Program Name} and Mentorloop would like to thank you for your participation in the {Cohort/Year} {Program Name}.

We had {number of participants / number of matches / average MQS} in the mentoring program, highlighting the value this program provides.

In preparation for the next iteration of the program, we will be closing out your loops in order to facilitate another round of matching.

We recommend you log in to Mentorloop one final time to contact your mentoring partner and thank them for their time. If you plan to keep in touch, it might also be worthwhile asking for their contact details.

We hope that you have enjoyed participating in the program and we look forward to setting up your next mentoring relationship. Alternatively, if you would like to take a break please reply to this email and we can remove your account.

Thanks,

Manual Matching

If you're manually matching your participants, let them know when.

Tip! You can also update the 'New Match Email Notification' with specific information, via *Manage Program > Settings*.

Hi,

It's time to meet your match!

In a couple of days we'll be matching you with someone from within your program! It may be worthwhile allowing some time in your schedule, for the first meeting.

We're hopeful this match is a life changing connection but it may also just be the first step in building out your [personal advisory board](#).

Thanks,

Matching Opt Out

Give participants the opportunity to opt out of matching and the program when re-launching.

Hi,

{Program Name} and Mentorloop would like to thank you for your participation in the {Cohort/Year} {Program Name}.

We had {number of participants / number of matches / average MQS} in the mentoring program, highlighting the value this program provides.

We hope that you have enjoyed participating in the program and we look forward to setting up your next mentoring relationship!

Alternatively, if you would like to take a break simply mark your status as ['unavailable'](#).

Thanks,

Milestones

Milestones are a good way to track progress over time. If you want your participants to successfully get through these milestones, reaching out to encourage completion can be a great start!

First, filter for your participants, per milestone.

- 1. Navigate to Manage program and select the Participants tab.**
- 2. Filter for 'Mentoring Milestone' and select any of the relevant milestones.**

Next are some helpful message templates to get your communications plan started.

Milestone 1: Getting Started

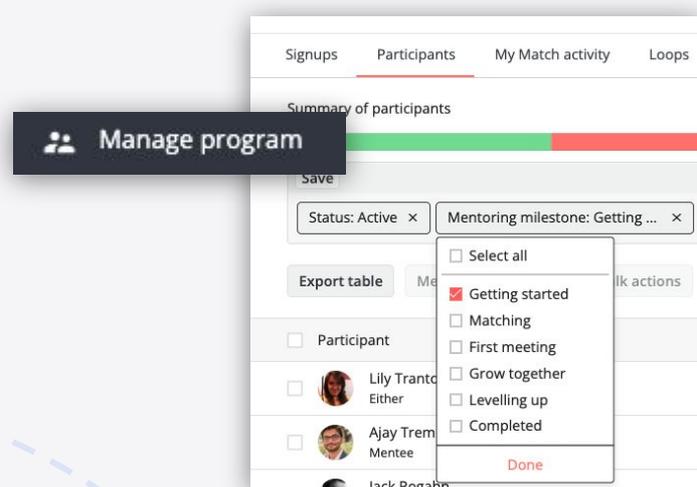
Keep participants on track and enable a positive experience throughout all stages of their mentoring journey.

Hi,

I've noticed that you are still in the 'Getting Started' milestone, so I wanted to check in.

*Ready to start your mentoring journey?
Take the next step, and tick off your first milestone.*

If you need any assistance in finding a match, please let me know via this 1:1 loop.



Milestone 2: Matching

Encourage participants to keep up momentum after matching and contact their mentoring partner.

Hi,

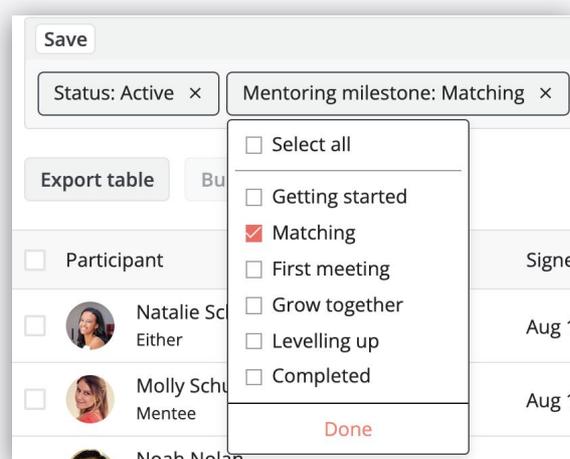
Matching with a mentoring partner is exciting (and sometimes daunting!)

We have noticed that you're still in your 'matching milestone' so we wanted to reach out and encourage you to introduce yourself to your partner if you haven't already.

If you're unsure on how to reach out, [check out this resource that'll help you!](#)

If you have, make sure you check it off in your mentoring milestones dashboard, so you can access relevant next steps and resources.

As always, we're here to help, so let us know if there's anything you need.



Milestone 3: First Meeting

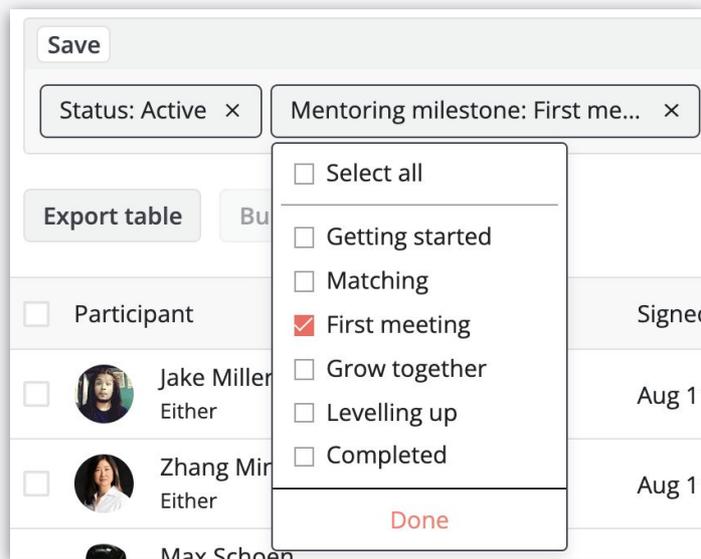
Encourage participants to have their first meeting and set a goal.

Hi,

We've noticed you're still on your first meeting milestone.

If you've had your first meeting, remember to tick off your milestones and add a goal to your goals dashboard!

Goals are flexible, not fixed - which means you can always revisit or edit them later on. We recommend you add a goal today!



The screenshot shows a web interface for managing mentoring milestones. At the top, there is a 'Save' button and two tabs: 'Status: Active' and 'Mentoring milestone: First me...'. Below the tabs are buttons for 'Export table' and 'Bu...'. A table lists participants with checkboxes for selection. A dropdown menu is open, showing a list of milestones with checkboxes. The 'First meeting' milestone is selected with a red checkmark. A 'Done' button is at the bottom of the dropdown.

Participant	Milestone	Status
<input type="checkbox"/> Participant		
<input type="checkbox"/> Jake Miller Either	<input type="checkbox"/> Getting started	Signed
<input type="checkbox"/> Zhang Mir Either	<input type="checkbox"/> Matching	Aug 11
<input type="checkbox"/> Max Schoen	<input checked="" type="checkbox"/> First meeting	Aug 11
	<input type="checkbox"/> Grow together	
	<input type="checkbox"/> Levelling up	
	<input type="checkbox"/> Completed	

Milestone 4: Grow Together

Encourage participants to complete their milestones and work towards their certification.

Hi,

Great news, you're so close to getting your official Mentoring Certification!

[How Do I Become Certified?](#)

To become certified, simply check off your Milestones on your Mentorloop dashboard as you progress.

[What is the Mentoring Certification?](#)

It's about the process, commitment and dedication to learning. So whether you're a mentor or a mentee, once you have completed your mentoring journey, you can become Mentorloop certified by adding a badge to your linkedin profile!

Save

Status: Active × Mentoring milestone: Grow

Export table Bu

Participant

- Select all
- Getting started
- Matching
- First meeting
- Grow together
- Levelling up
- Completed

Done

Sentiment

The Sentiment Dashboard allows you to track the progress of your program. You are able to keep a pulse on how your participants are going and help out in real-time!

We've pulled together some useful ways you can use sentiment data to help you manage your program.

Negative Sentiment

Assist participants who have shared negative feedback, or closed their loop.

To identify negative sentiment, follow these steps:

1. Navigate to your Sentiment tab.
2. Filter for "Rating" and select star ratings of 1 and 2.
3. Comments regarding their rating will be visible. To 1:1 message simply click on their name and their profile will appear.



Some common reasons and responses you can follow up with are in the following page.

Negative Sentiment

NO RESPONSE FROM MENTORING MATCH

Hi,

I have been reviewing your comments and see that you haven't received a response from your mentor/mentee, {Name}. I am so sorry about this experience, I understand how frustrating it is.

Would you like me to reach out to see if they are interested in continuing? Alternatively, I can close out the loop and help you find another match.

Thanks,
{Program Coordinator}

NO TIME

Hi there,

I noticed you closed your loop with (Name) due to having no time. I understand things are busy, and sometimes we need a break.

If you would like to continue your mentoring journey another time, feel free to temporarily make yourself unavailable. This means you will no longer receive requests, or become manually matched!

You can make yourself available whenever you are ready to participate!

Thanks,
(Program Coordinator)

TIP: It's always good to check in on the mentor/mentee that had their loop closed to see if they need to be re-matched with another person!

Left Program

Assist participants whose partner has left the program

Hi,

I have been reviewing the comments and have noticed that your mentoring match, (name), has left the program. I can also see that you haven't been re-matched or found a new mentor/mentee.

(If Self Match is on)

To find a new mentoring match, all you need to do is navigate to the 'Find New Matches' tab where you can filter for potential matches based on what your preferences are! Otherwise, I can manually match you myself with a participant who is available!.

(Manual matching)

If you would like to be re-matched please let me know, along with any specific skills or goals you want to achieve throughout the mentoring program. From there I can help find you a new match!

Thanks!

Not Suitable

Assist participants who feel their match was not suitable

Hi,

Sorry to hear that your mentoring match has not been suitable. Are you able to shed some light on why it was not suitable for you as I may be able to help find you a new mentoring match?

(If Self Match is on)

To find a new mentoring match, all you need to do is navigate to the 'Find New Matches' tab where you can filter for potential matches based on what your preferences are! Otherwise, I can manually match you myself with a participant who is available.

(Manual matching)

If you would like to be re-matched please let me know, along with any specific skills or goals you want to achieve throughout the mentoring program. From there I can help find you a new match!

Thanks!

Haven't Met Yet

Encourage participants to schedule their first meeting

MENTEE HASN'T MET MENTOR

Hi (Name),

Sorry to hear that you haven't met (Name) yet! I understand it may be quite intimidating to reach out to your mentor, especially if this is your first mentoring experience!

Mentorloop have some great resources on what to expect and how to be prepared for the first meeting:

- [How to be an awesome mentee](#)
- [First meeting checklist for mentees](#)
- [Schedule your meeting](#)

Try stepping outside your comfort zone and schedule a meeting with your match!

MENTOR HASN'T MET MENTEE

Hi (Name),

Sorry to hear that you haven't met (Name) yet!

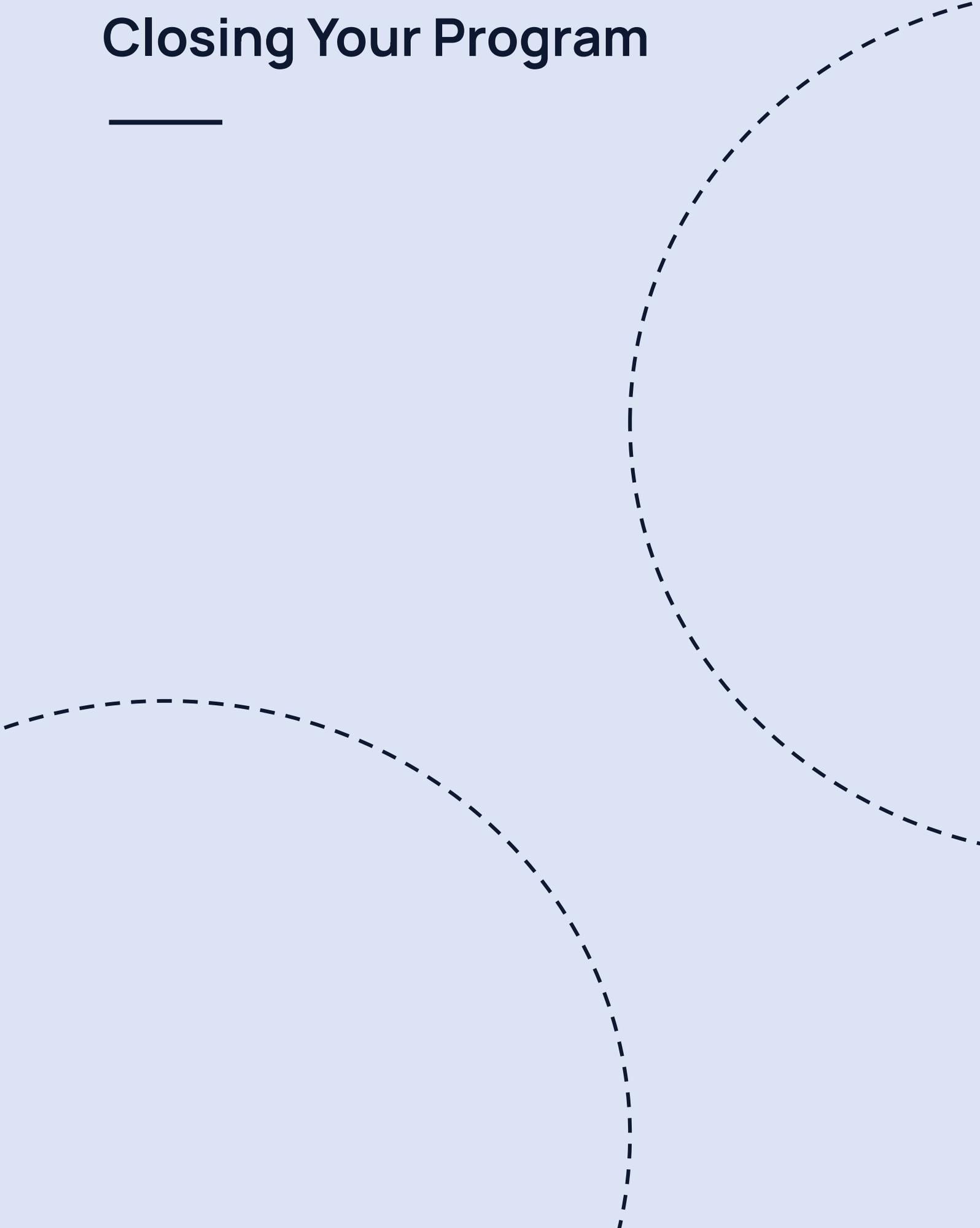
As a mentor, you may already be comfortable with the mentoring experience but your mentee could be the complete opposite!

It has been more than **(Number of days/months since match)** since you've been matched and as much as we encourage mentees to reach out first, they may be nervous, or not know how to approach you.

I suggest reaching out to your mentee and scheduling the first meeting. From there, you can establish how the mentoring relationship will go. Here are some helpful resources to support you:

- [Mentoring agreement](#)
- [First meeting checklist for mentors](#)

Closing Your Program



Key Steps

We offer some guidance, so that closing your program is a smooth experience for all.

- 1. Communicate Program Closure**

Ensure your participants know when the program is closing, so they can have their final meeting and download any relevant files they may need.

- 2. Export Your Program Data**

Visit each tab in 'Manage Program' and export any data you think you might like to keep record of.

- 3. Speak to your CSM**

Your Mentorloop Customer Success Manager, will be able to close your program for you. Both you and your participants will lose access to the Mentorloop platform.

Program Closure

Inform your participants that the mentoring program is coming to a close and provide them with next steps.

Hi {name},

{Organisation} and Mentorloop would like to thank you for your participation in the {Mentoring Program Name}. It was fantastic to see over {No. of participants} mentors and mentees take part.

This program is coming to a close on {Date}

What is Next?

We recommend you log in to Mentorloop at least one more time to contact your mentoring partner and thank them for their time.

We highly encourage you to continue an informal mentoring relationship outside of this program if that is right for you. Make sure you have a conversation to see if this is something you are both interested in and, if so, exchange contact details.

If you would like to save the conversations you've had, the content of your loop can be exported, you simply need to log into Mentorloop and click here - <https://app.mentorloop.com/export-loops-data>.

Please note that files shared within your loop need to be exported separately.

We hope that you have enjoyed participating in the program.

Summary

In this playbook, we provided comms related to:

- [Re-launching your Program](#)
- [Encouraging Milestones](#)
- [Sentiments](#)
- [End of Program](#)

We hope that this helps you effectively communicate to your participants and take charge of your mentoring program!

For more information, resources, and guides, head to our website here:

mentorloop.com

