

Program Coordinator User Guide (Enterprise)

This guide will show you how to make the most out of your new program. It will highlight key features and processes to help you drive mentoring forward and, in doing so, change some lives for the better!

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Getting Started

Getting started

Define the why for your program

The first step to building your mentoring program is getting clear on your program objectives and vision of success. With that clarity, you will be able to create a Signup form that will help you achieve your goals. The Signup form is what will be used to recruit Participants, make up their profiles and inform the matching process, so should provide a detailed picture of your mentors and mentees.

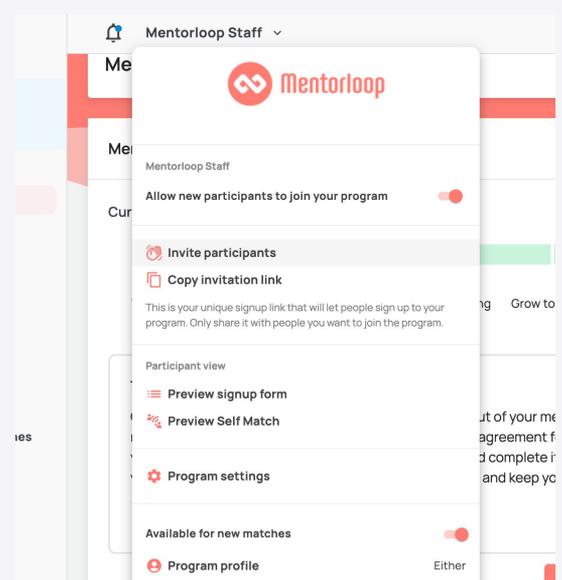
Mentorloop will provide you with a series of questions designed to achieve this by encouraging reflection on professional skills and future goals.

Working with an onboarding specialist, you can build on these questions to guide your people's profiles in a specific direction, or create data points for matching or reporting that are unique to your program.

Sharing your Signup form

Once complete, you can invite Participants to register for the program quickly and easily by sharing your unique Signup form link, which can be found in the middle dropdown menu on the top navigation bar of your Dashboard, or from your *Program settings*.

From *Program settings* you can also turn off the *Active* toggle to [close registrations](#) for your mentoring program.



Signup form

Copy link

Preview

Active

This is your unique signup link that will let people sign up to your program. Only share it with people you want to join the program. Each successful signup will count towards your total user count.

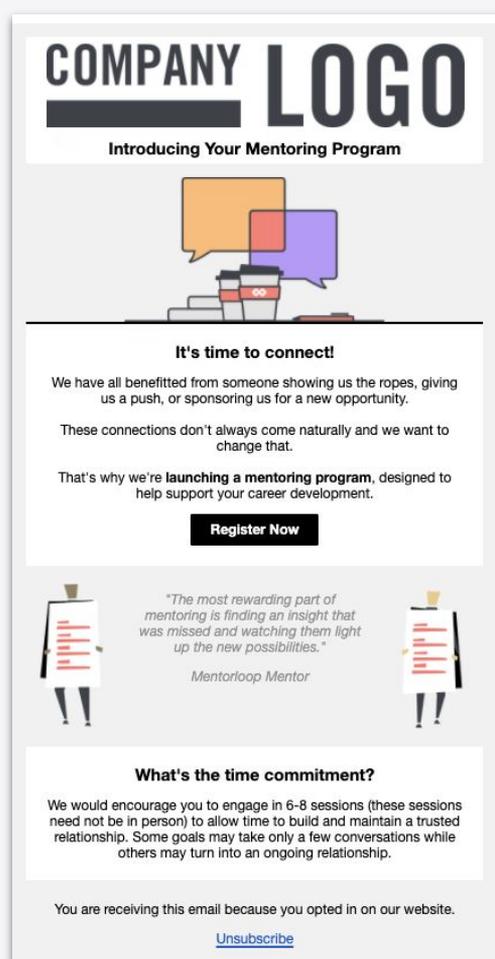
Getting started

Marketing & recruitment

Before you start inviting Participants to join your program, you may need to do some program promotion to find those people in the first place, and get them excited to sign up. That can sound daunting, but don't worry, we're here to help! Here are some of our top tips to marketing your program:

- **Use assets you have** in place already to shout about your program - emails, internal intranets, Slack, your website etc.
- **Plan a launch event** or mentoring session to kickstart interest, give people a chance to find out more and get a head start on connecting your mentors and mentees.
- **Identify your [Mentoring Champions](#)** and ask them to share their experiences with mentoring to help bring to life the value of your program.

We've put together an entire guide on [how to effectively market your program and recruit Participants](#), which you can download [here!](#)



Managing Signups

The Signups page

As your people begin signing up, they will appear on the *Signups* page. The green bar on this page tells you how far in the registration process people are, and what point they got up to before dropping off. This helps you keep track of those who may have started signing up but, for some reason, have not completed registering. You may want to reach out to these people to offer support and see if they still want to join the program.

Summary of signups Form progress: 33%: 4 / 60%: 4

Status: Active X Search or filter... Review this history Clear Filters

Export table Bulk actions Copy link 1 - 8 of 8

Participant	Signed up	Completion	Last activity
<input type="checkbox"/> Ashley Gistason	Oct 22, 2021	<div style="width: 33%;"></div>	Applied for program Oct 22, 2021
<input type="checkbox"/> Elizabeth Friesen	Oct 22, 2021	<div style="width: 60%;"></div>	Applied for program Oct 22, 2021
<input type="checkbox"/> Declan King	Oct 22, 2021	<div style="width: 60%;"></div>	Applied for program Oct 22, 2021
<input type="checkbox"/> Levi Thompson	Oct 22, 2021	<div style="width: 60%;"></div>	Applied for program Oct 22, 2021
<input type="checkbox"/> Abigail Waters	Oct 22, 2021	<div style="width: 60%;"></div>	Applied for program Oct 22, 2021
<input type="checkbox"/> Chelsea Zboncak	Oct 22, 2021	<div style="width: 60%;"></div>	Applied for program Oct 22, 2021
<input type="checkbox"/> Rose Schamberger	Oct 22, 2021	<div style="width: 60%;"></div>	Applied for program Oct 22, 2021
<input type="checkbox"/> Christian Waters	Oct 22, 2021	<div style="width: 60%;"></div>	Applied for program Oct 22, 2021

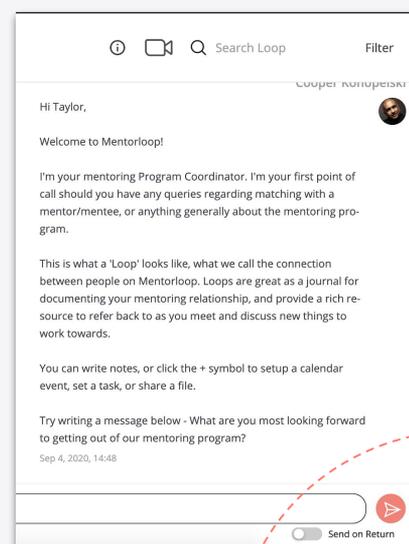
Once the form is completed in full and they have verified their emails, they will become a *Participant* and appear on the *Participants* page.

Remember that everyone will need to [verify their email address](#) to complete registration. So if someone's bar is fully green but they remain on the *Signups* page, this means that they have completed the form but have not yet authenticated their account.

Loop introduction message

On joining the program, all Participants will have access to a 1:1 Loop with you as the Program Coordinator.

They will all receive an automatic welcome message which you can customise via your *Program settings* to include information relevant to your particular program, such as what to expect and next steps.



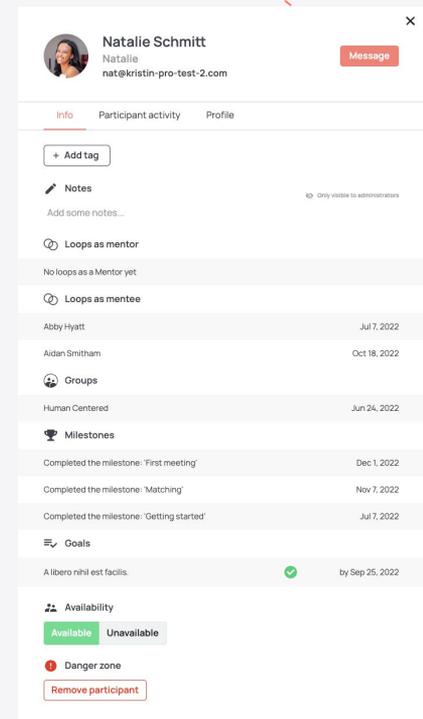
The Participants page

Managing Participants

The *Participants* page is from where you can manage your mentors and mentees on an individual and bulk level.

Selecting one of your mentors or mentees from the list brings up a summary of the person's Loops, Group Loops, Goals and Milestones activity in one, easy-to-manage location. From here you can also view their profile, message them directly or manage their *Self match availability*.

You can segment your Participants using the handy [filters](#) at the top of the list and apply [tags](#) to easily manage specific groups of people/cohorts. The *Participants* page is also form where you can [remove and re-add](#) people from/to your program.

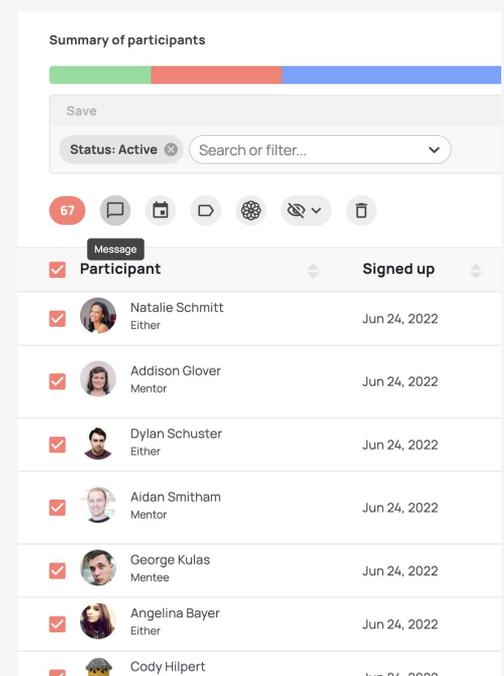


Bulk actions & messages

You can also carry out a series of bulk actions using the icons that appear at the top of the *Participants* page:

- Send [bulk messages](#)
- Schedule meetings
- Tag Participants
- Add people to Group Loops
- Remove people

In particular, our experience across our many mentoring programs has taught us that the most successful mentoring programs check in at least once a month with all their participants to "beat the drum of mentoring". You can do this by sending [Bulk Messages at a regular cadence](#).



PC Dashboard

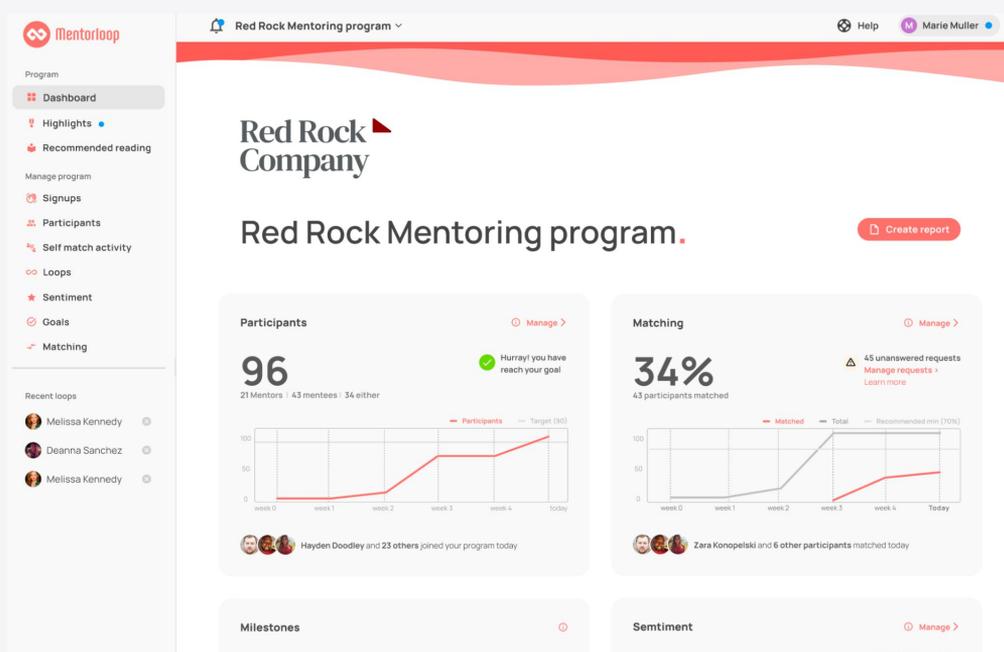
Your Dashboard

The PC (Program Coordinator) Dashboard is the home of your mentoring program. It helps you focus on the five key indicators of successful mentoring programs:

- Participants
- Matching
- Milestones
- Sentiment
- Highlights

It helps you understand the health of your mentoring program in real time, with actionable data charts and mentoring stories from real Participants, and gives you a clear view of your overall Mentoring Quality Score (MQS), where your participants are on their mentoring journey ([Milestones](#)) and how you're tracking towards your recruitment targets.

We'll dive deeper into some of the Dashboard widgets as we go through this guide.



Matching

Manual matching

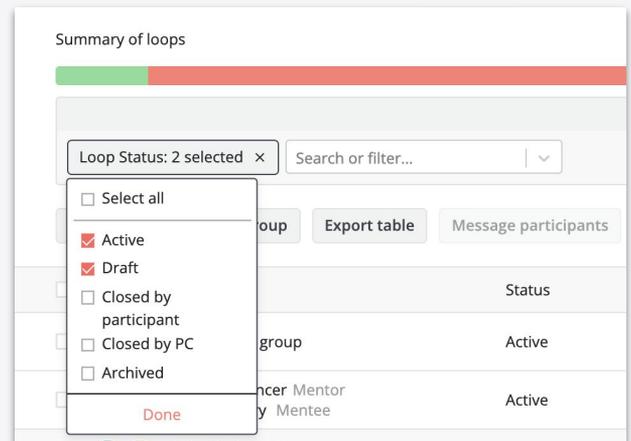
Creating a Loop

If you have opted for Manual matching, you will be responsible for creating the Loops from *Loops* page on the left sidebar.

To create a Loop and start pairing mentors and mentees, click the *Create* button and select *Loop*.

A list of your Participants will appear (remember to check what filters may be applied!). Click and select the Participant you wish to match, then click through the potential match options that appear on the left hand side. You can use the filters to narrow down your search based on your chosen criteria, view their profiles side by side, and see any areas of overlap highlighted in pink.

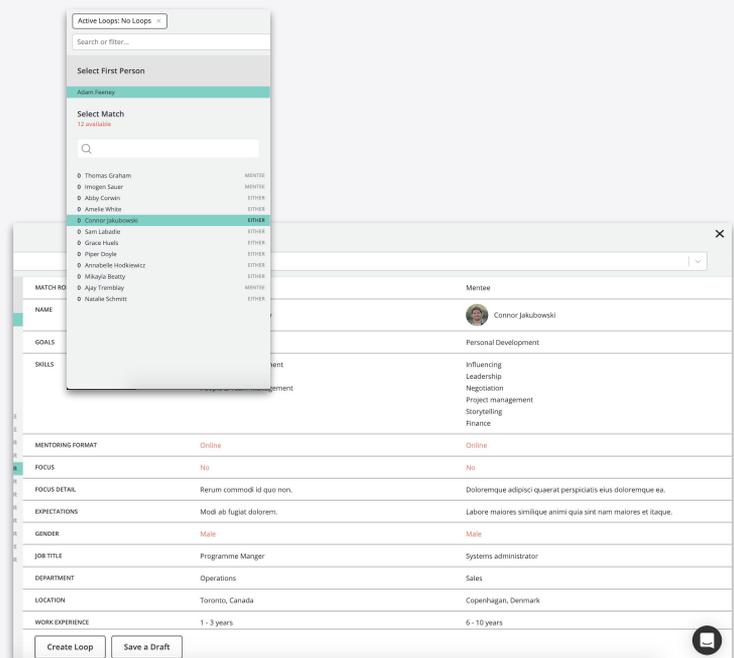
Here's a step by step [guide on creating Loops](#).



New match email notification

Once you have created a new Loop, both individual Participants will be sent a message notifying them that they have been matched, and introducing them to their partner. You can update the content of this message from your *Program settings*.

Note that when you create a singular Loop, you'll also have the opportunity to customise the message further, or not send it at all.



Self matching

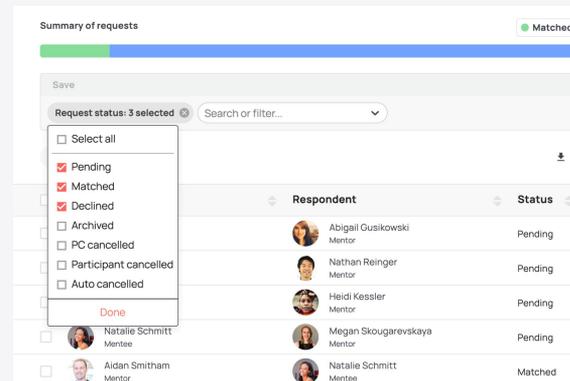
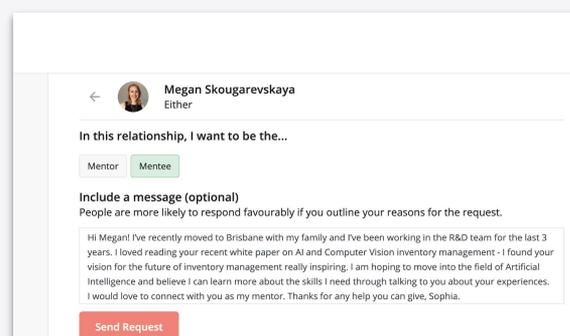
Self match activity

If you have Self match enabled for your program, mentors and mentees are empowered to find their own matches. Mentorloop's algorithm will provide them with a set of *Recommended matches* to help make the matching process as easy as possible.

Find out more about [how Self matching works](#).

We recommend keeping an eye on the *Self match activity* page which can be found on the left side bar of your Dashboard to track the status of matching and identify anyone who may need your help.

For further information on how to get the most out of this page and help your Participants, check out our [Self match best practice](#) tips.

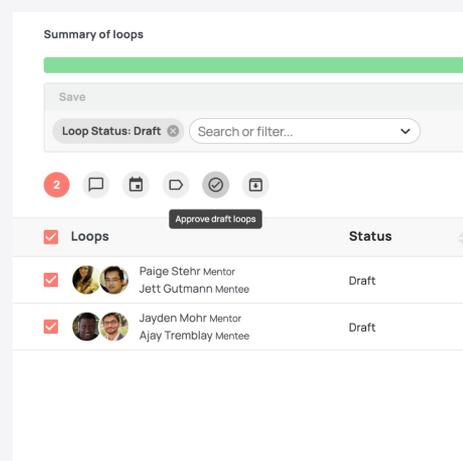


Algorithmic matching

Approving Draft Loops

For our Enterprise customers, we also offer Algorithmic matching, which takes into account your unique set of matching criteria to provide you with a set of draft Loops. This matching method saves you time and effort, and provides you with the best possible set of equitable matches.

You will have a chance to review the draft Loops to sense check them and make sure you're happy with them before making them live. Simply navigate to the *Loops* page, change the *Loop status* filter to *Draft* and [approve the draft Loops](#) either individually or in bulk, using the icon at the top of the list.



More on Loops

Group Loops

Group Loops are essentially group chats created by you, the Program Coordinator, where multiple Participants can connect, ask questions, share insight and tips!

Before creating a Group Loop, we advise having a clear vision defined for the group, that is - the why, the who and the what about.

To create a Group Loop, select the Participants you'd like to join from the *Participants* page and click the *Add to group loop* button at the top of the list. Alternatively, click the *Create* button from the *Loops* page, select *Group loop* and follow the instructions that appear or check out [this guide](#).

Viewing Loop activity

You can view activity within each Loop by navigating to the *Loops* page, clicking the three dots to the right hand side of an individual Loop and selecting *Activity*.

Of course, the contents of the Loop conversations remains confidential, however you will be able to view the activity that has taken place, including when the mentor and mentee last chatted in the Loop.

Create a group loop Review loop

Loop title

Added

Participants

Filters: You can filter the participants by selecting one or multiple tags in the participant description.

Search		
Declan Reinger	Mentor	<input type="checkbox"/>
Paige Stehr	Mentor	<input type="checkbox"/>
Addison Glover	Mentor	<input type="checkbox"/>
Nathan Reinger	Mentor	<input type="checkbox"/>
Abby Hyatt	Mentor	<input type="checkbox"/>

Loop with Abby Hyatt and Natalie Schmitt ✕

Jan 18, 2023, 15:22	Natalie Schmitt chatted
Dec 6, 2022, 13:57	Natalie Schmitt created a meeting
Dec 6, 2022, 13:41	Natalie Schmitt created a meeting
Dec 6, 2022, 13:40	Natalie Schmitt chatted
Dec 6, 2022, 13:40	Natalie Schmitt created a meeting
Dec 6, 2022, 13:40	Natalie Schmitt created a meeting
Nov 23, 2022, 15:24	Natalie Schmitt chatted
Oct 28, 2022, 15:23	Natalie Schmitt chatted
Jul 7, 2022, 10:00	Loop created
Jul 4, 2022, 11:56	Loop drafted

Build Momentum & Measure



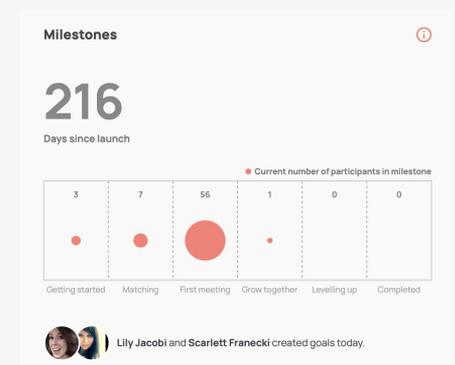
Mentorloop

Driving engagement

Milestones

The Mentoring milestones track Participants' progress in mentoring their journey. At each milestone, Participants will be set recommended tasks and actions, making it easy for them to move along and enjoy a more structured mentoring experience.

Get an overview of where Participants are in the milestones from your Dashboard, or dive deeper into individuals by viewing their profile from the *Participants* page. You can also filter down the entire list of Participants by *Mentoring milestone* to see a breakdown of mentors and mentees at every stage.



Managing Participants

Beyond filtering your Participants to segment your view, the *Participants* page is also from where you can carry out a series of actions to drive program engagement.

You can:

- Message Participants
- Schedule meetings
- Apply tags
- Remove/Un-remove people
- Add Participants to a Group Loop
- Make someone Available/Unavailable for mentoring

All of the above actions can be carried on on an individual or bulk level using the action icons at the top of the Participants list.

We recommend regularly checking in with Participants, taking advantage of the bulk actions to save time while keeping mentoring front of mind and encouraging them through the Mentoring milestones.

Find out more about [how you can maximise your time using tags, filters and bulk actions.](#)

Save

Status: Active x Mentoring role: Mentee x

9 [Message] [Calendar] [Share] [Filter] [Eye] [Trash]

Participant [Dropdown] **Sig**

<input checked="" type="checkbox"/>		Abigail Littel Mentee	Jur
<input checked="" type="checkbox"/>		George Kulas Mentee	Jur
<input checked="" type="checkbox"/>		Owen Poulos Mentee	Jur
<input checked="" type="checkbox"/>		Ajay Tremblay Mentee	Jur
<input checked="" type="checkbox"/>		Benjamin Boyle Mentee	Jur
<input type="checkbox"/>		Cameron Feil	

Participant feedback

Automated surveys

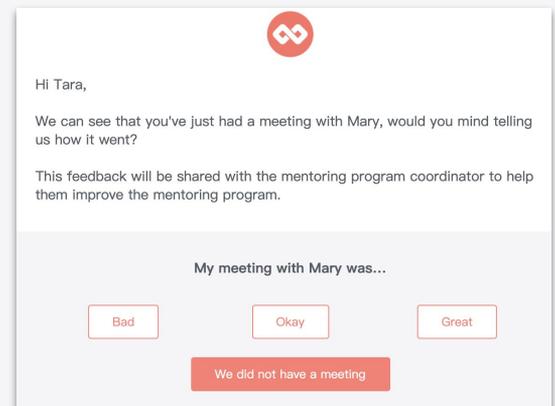
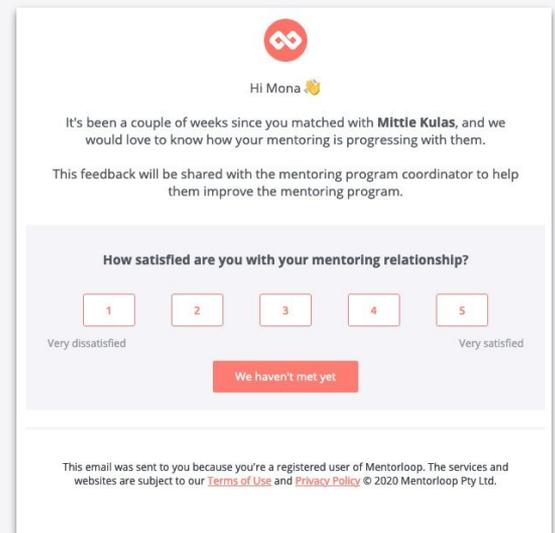
Mentorloop helps you gather real time insight into the health of your program by sending out three types of surveys to Participants at key points in their mentoring journey:

1. MQS (Mentoring Quality Score) - understand the satisfaction between the mentor and mentee. This survey is sent 30 days post match, and every 90 days after that.
2. Post-Meeting - get feedback from Participants' mentoring meetings. This survey is sent after a mentor or mentee schedules/launches a meeting within their 1:1 Loop.
3. Close Loop - understand why a mentoring relationship has come to an end. This survey is sent when a mentor or mentee opts to 'Close Loop' in their 1:1 Loop.

Your average scores and overall MQS will appear automatically on your Dashboard, which helps you focus on the most important measurements of program success.

For more granular information, navigate to the left sidebar and click on *Sentiment*. From here you can filter the feedback, for example you can narrow down your view to only 5 star ratings to help you identify your mentoring champions!

[Find out more about Mentorloop's surveys](#) and [the Sentiment page](#).



Product Tour

Signups Participants My Match activity Loops **Sentiment** Goals Settings Admin Matching Recruitment form schema Exports NEW Review this feature

Sentiment summary Mentoring quality score: 165 Close loop survey: 11 Post-meeting survey: 69

Search or filter... NEW Review this feature Clear Filters

Export table Bulk actions Copy link Learn more about this 1 - 30 of 245

Participant	Date		Survey type	Rating	Comment
Phoenix Wisozk Mentor	Oct 21, 2021	Beau Bradtke Mentee	Close loop survey	★★★★☆ <small>LEFT PROGRAM</small>	Exercitationem laborum consequatur repellat voluptatem et perferendis unde magnam ullam.
Sarah Fay Mentor	Oct 21, 2021	Benjamin Walker Mentee	Mentoring quality score	★★★★☆	Qui eum rerum aut reiciendis doloremque earum quae sint aut.
Phoenix Fay Mentor	Oct 21, 2021	Oscar Walker Mentee	Mentoring quality score	★★★★★	Voluptatem aliquam ullam vel.
Jonathan Sauer Mentor	Oct 21, 2021	Jade Koss Mentee	Post-meeting survey In-person meeting	★★★★★	Odio ipsum corporis ab minima id.

Working with Mentorloop

Mentoring reviews

As part of the Enterprise package, you will have regular check ins with your Mentorloop Account Manager, who will work with you to help you stay on track to achieving your objectives, and provide expert insight into ensuring success for your program.

Beyond this, at a certain point in your program, you will also be provided with an in-depth Mentoring program review, which dives deep into the health of your program. The contents of this is unique to your program, however will typically include:

- Review of objectives
- Accomplishments to date
- Feedback and statistics from Participant surveys
- Program configuration health
- Recommendations
- Product roadmap

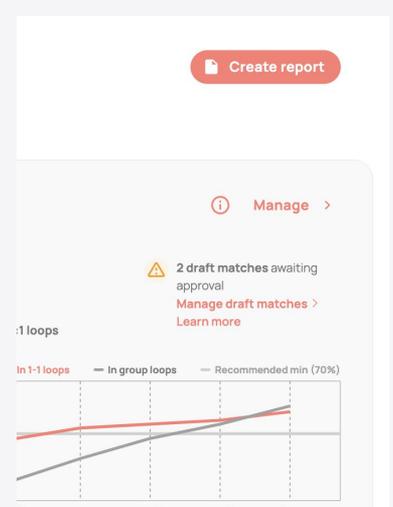
Your Account Manager will talk you through the report and work with you to ensure we're working together in the best way possible in order to drive your program to lasting success.

Downloadable PDF

You can also download a PDF report of your program health at any point from your Dashboard.

Exporting data

Should you require additional data reporting, please use the [export buttons](#) throughout your program. You can also filter your information first and then download program data on that specific group of Participants or Loops.



Grow

Grow

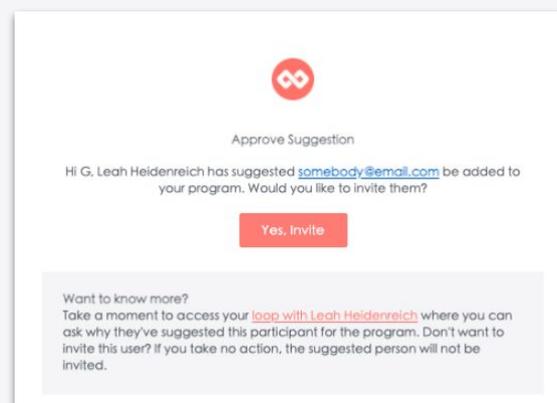
Suggest a mentor/mentee

Mentors and Mentees can submit a referral of a friend to you as the Program Coordinator. This is a great way for your program to grow organically! When you notice these referrals come through, you can invite participants straight into the program by sending the registration link with one click. [See here](#) for more info.

There is also another feature in which you as the Program Coordinator can invite new participants directly from your dashboard. [See here](#) for more info.

Participants can suggest a friend three ways:

1. Straight from their dashboard
2. At the end of the registration process
3. If self-matching is enabled, they can suggest a mentor/mentee from the *Find a match* page under *Matching* on the left sidebar



Program promotion

There are many strategies for growing your program, such as a relaunch, mentoring event, mentoring champions and more. But a simple way to start promoting your program is via existing communication channels within your organisation.

Remember, we've got an in-depth guide to marketing your program and recruiting Participants. It's full of helpful tips, real-life examples and handy templates ready for you to use.

Download your guide [here](#)! And check out [the Help Hub](#) for more recruitment tips and tricks.

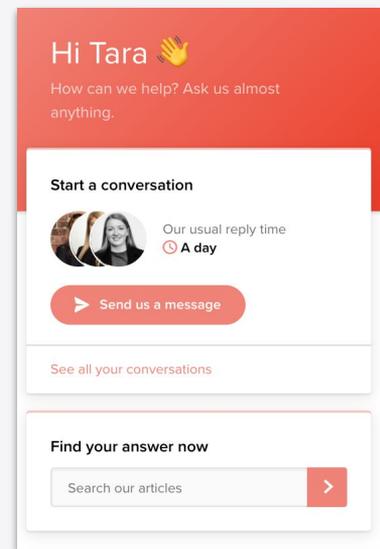


Support

Support

Customer Success support

Your mentors and mentees will have access to the Customer Success team via a support widget if they run into any technical problems. We also offer mentoring advice to help guide our mentors and mentees through their mentoring journey.

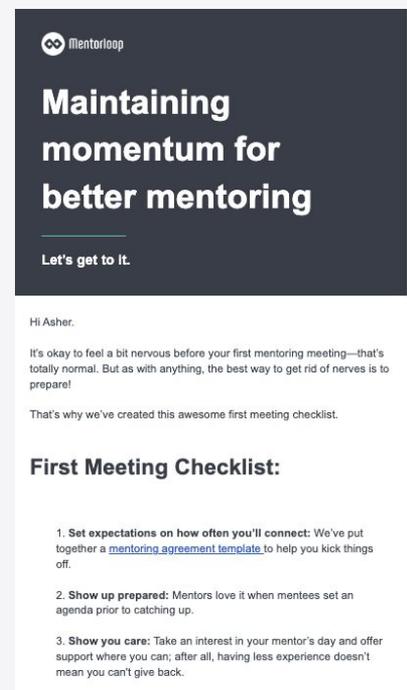


Mentorloop Nudges

Mentorloop will send communications throughout the first six months of the mentoring journey which includes tips and tricks to keep the momentum going.

Mentorloop offers the ability to customise these communications to reflect your organisation/community tone of voice and branding at an additional cost. Feel free to reach out to your Account Manager if you would like further information.

In the meantime, [find out more about Nudges.](#)

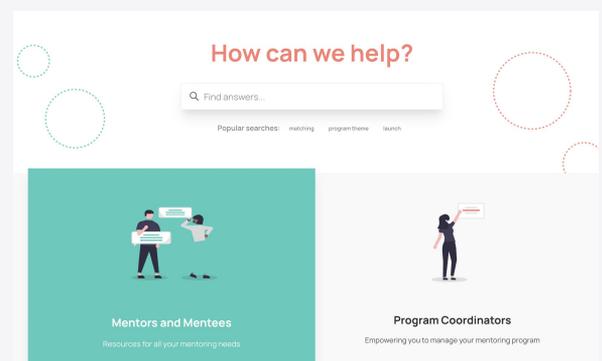


The Help Hub, Academy and blog

You and your Participants also have access to [the Mentorloop Help Hub](#), which provides advice including how to use the platform and how to navigate your mentoring relationship.

The Help Hub is also home to [the Academy](#), which helps mentors and mentees be great in their role and get the most out of the program.

[Our blog](#) is also full of ideas and expert insights that can help you run a great program, as well as your Participants to be great mentors and mentees. It covers a range of topics including advice for mentors and mentees, employee engagement and diversity and inclusion.



FAQs

Getting Started

[How to Whitelist Mentorloop](#)

[How to preview sign up form](#)

[How to close a sign up form](#)

[Mentoring Champions](#)

[Mentorloop Blog](#)

[Program Coordinator Welcome Message](#)

Participant Management

[How your Participants Tab works](#)

[How to filter participants](#)

[Participant Filter Examples](#)

[Bulk Messages](#)

[How to create tags](#)

[How to edit and remove tags](#)

[How to export data](#)

[How to remove participants](#)

[Change a Program Coordinator](#)

[Difference between an Admin and Program Coordinator](#)

[Conversations within Loops](#)

Matching

[How to create a loop](#)

[How to Approve/Dismiss draft loops](#)

[Recommended Matches FAQs](#)

[How does Self Match work](#)

[Group Loops](#)

Features

[What are Milestones](#)

[Sentiment Dashboard](#)

[Goals Dashboard](#)

[Refer a Friend/Program Coordinator Invite](#)

[Integrations](#)

[Video Conferencing](#)

