

03

Matching



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The mentor-mentee matching process is one of the most important factors influencing the success of a mentorship program. A thoughtful matching strategy helps establish productive relationships, aligns participant expectations, and increases the likelihood that both mentors and mentees will remain engaged.

There is no single matching method that works for every firm. The appropriate approach depends on factors such as firm size, program goals, organizational culture, and the career stages of participants. Some firms may benefit from a structured, data-driven approach, while others may prefer a more relationship-based process.

Four common matching approaches are:



Survey-based
matching



Mentor-led
matching



Mentee-led
matching



Randomized
matching

Each approach has advantages and considerations. Firms may choose one method or combine multiple approaches to best support their goals.



Survey-Based Matching

Survey-based matching uses participant information to create intentional mentor-mentee pairings based on shared goals, experience, preferences, and areas of expertise. This approach creates a structured process that reduces the potential for unconscious bias or mismatched expectations.

A survey can collect information such as:

- **Goals and aspirations:** Align mentees' professional goals with mentors' experience and expertise.
- **Skills and expertise:** Match mentees with mentors who have relevant technical, project, or leadership experience.
- **Shared interests:** Identify common interests, such as sustainability, project types, market sectors, or professional development goals.
- **Communication preferences:** Gather preferences for meeting frequency, communication style, and level of structure/formality.
- **Experience level:** Consider career stages, leadership experience, and professional responsibilities.
- **Representation and identity:** When appropriate, provide opportunities for individuals to connect with mentors who share or understand aspects of their background and experiences.

Survey information should not only be collected at program launch. Periodic surveys can help firms understand changing needs, evaluate program effectiveness, and improve future matching efforts.

Sample Matching Criteria

Once survey information has been collected, firms should establish clear criteria for evaluating potential matches. Criteria might include:

- **Professional alignment:**
Match mentees with mentors who have experience relevant to the mentee's interests or career goals.
- **Career development needs:**
Pair emerging professionals with mentors who can provide insight into their desired career path.
- **Communication and working style:**
Consider whether participants' preferences for feedback, collaboration, and communication are compatible.
- **Representation and perspective:**
Create opportunities for participants to learn from individuals with similar or different backgrounds, experiences, and perspectives.

Allowing mentors and mentees to identify preferred criteria, priorities, or potential limitations can help create stronger matches and increase participant ownership of the process.



Mentor-Led Matching

Mentor-led matching allows mentors to take an active role in identifying mentees they believe they can effectively support. This approach can increase mentor engagement by creating relationships based on shared interests, expertise, and professional goals.

Possible mentor-led approaches include:

- **Networking or matchmaking events:** Host a structured event where mentors and mentees have brief conversations with multiple potential matches. Following the event, mentors and mentees can identify relationships they would like to continue exploring.
- **Mentor-led learning groups:** Create small groups of mentees who meet with a mentor over several sessions. After participants become familiar with one another, mentors may establish more focused mentoring relationships.
- **Application process:** Provide mentors with anonymized mentee profiles, goals, or development interests. Mentors then identify individuals they feel they are best positioned to support.
- **Mentee pitch process:** Ask mentees to describe their professional goals, interests, and what they hope to gain from mentorship. Mentors then select mentees whose goals align with their experience and interests.

Benefits of Mentor-Led Matching

- **Increased mentor engagement:**
Mentors are more likely to invest in relationships where they feel their experience can provide meaningful value.
- **Strong alignment:**
Matches are often based on shared interests, expertise, and development goals.
- **Efficient relationship building:**
Mentors can help identify where their skills and experience are most relevant.
- **Greater ownership:**
Participants may feel more invested when they have an active role in forming the relationship.

Mentor-led and mentee-led processes can also be combined to create a shared selection process.

It may seem obvious, as commitment from both mentors and mentees is always necessary, but for this type of matching process to be successful, the buy-in of mentors is absolutely required; if they are not on board from the beginning, this approach will fall flat.



Mentee-Led Matching

A mentee-led matching process gives emerging professionals greater ownership in selecting a mentor based on their career goals, interests, and preferred learning style. This approach can be particularly effective for firms seeking to empower employees to take an active role in their professional development.

Possible mentee-led approaches include:

- **Mentor profiles or database:** Provide mentees with profiles of available mentors, including:
 - Areas of expertise
 - Project experience
 - Career background
 - Professional interests
 - Availability
 - Communication preferencesMentees review profiles and identify mentors they believe align with their goals.
- **Self-selection through outreach:** Mentees contact potential mentors directly with an introduction explaining their interests and why they believe the mentor may be a good fit.
- **Exploratory meetings:** Mentees meet with multiple potential mentors before selecting a long-term mentoring relationship.
- **Facilitated selection process:** Mentors provide information about their interests and availability, after which mentees indicate their preferred matches. A program coordinator can then facilitate final pairings.

Benefits of Mentee-Led Matching

- **Greater mentee ownership:**
Mentees take responsibility for identifying the support they need.
- **Higher engagement:**
Participants may be more invested when they actively choose their mentor.
- **Better alignment:**
Mentees can prioritize mentors whose experience, leadership style, and expertise match their goals.

For firms with many early-career professionals, a mentee-led approach can be especially valuable because it encourages agency and intentional career development. Do take care to consider mentor bandwidth, so as to not overload any one mentor.



Randomized Matching

Randomized matching creates mentor-mentee relationships without relying on participant selection. This approach can introduce new perspectives, reduce selection bias, and create opportunities for connections that may not have otherwise occurred.

Possible randomized approaches include:

- **Automated or lottery matching:** Mentors and mentees are randomly paired. Clear expectations and program guidance are important to help participants build successful relationships.
- **Randomized group mentorship:** Create small groups consisting of multiple mentors and mentees. Group size should reflect mentor availability and comfort level.
- **Career stage or interest-based matching:** Randomly assign participants within defined categories, such as career stage, project type, or professional interests.
- **Speed mentoring:** Organize short introductory conversations between mentors and mentees. Participants rotate through multiple conversations before identifying potential connections.

Benefits of Randomized Matching

- **Diverse perspectives:**
Participants may gain insights from colleagues outside their immediate teams or disciplines.
- **Reduced bias:**
Randomization creates a more equitable starting point by limiting personal preferences or existing networks.
- **Expanded connections:**
Participants develop relationships across the organization or profession.

When launching a new mentorship program, randomized matching can be an effective starting point because it provides a simple, transparent, and inclusive process.

Mentor-Mentee Matching Criteria

Regardless of the matching method selected, firms should consider several factors when developing mentor-mentee pairings.

Goals & Expectations

Successful relationships begin with alignment around purpose and desired outcomes.

Consider:

- What does the mentee hope to gain from the relationship?
- Does the mentor have relevant experience to support those goals?
- Do participants have a shared understanding of expectations regarding meeting frequency, communication, and commitment?

Compatibility

A strong match depends on more than professional experience. Personal compatibility can influence trust, communication, and long-term success.

Consider:

- Does the mentee prefer hands-on guidance, discussion, observation, or structured feedback?
- How can communication preferences support establishment of trust and mutual respect?
- Can the mentor can adapt their approach to support the mentee's learning/working style?

Learning & Coaching Styles

Mentors and mentees should understand how each person prefers to share and receive information.

Consider:

- Does the mentee prefer hands-on guidance, discussion, observation, or structured feedback?
- Can the mentor can adapt their approach to support the mentee's learning style?

Commitment

Mentorship requires consistent participation from both individuals—a function of both the level of support they receive from the firm and their individual commitment to supporting a successful mentorship experience.

Consider:

- What is each person's availability?
- What meeting frequency is expected?
- How much time can they commit to the mentorship relationship and activities?
- What is each participant's willingness to prepare, participate, and follow through?

Commonality, Diversity & Perspective

Strong mentorship programs create opportunities for individuals to learn from a range of experiences and perspectives.

Consider:

- What are the demographic, cultural, life experience, and career path commonalities that can be a basis for connection among mentors and mentees?
- What are the demographic, cultural, life experience, and career path differences that can provide new perspectives and broaden understanding?
- How committed is each participant to principles of trust, respect, and openness in the mentorship relationship?

Motivation

The success of a mentorship relationship depends on the commitment of both participants.

Consider:

- Does the mentor have a genuine interest in supporting another professional's growth?
- Is the mentee prepared to seek feedback, ask questions, and act on guidance?
- Are both individuals committed to ongoing learning and development?