

02

Process & Timeline



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There is no single implementation model that works for every firm. The timeline below provides a flexible framework for a formal mentorship program that can be adapted to your firm's size, culture, and available resources. While it is presented as a sequence of phases, mentorship programs are most effective when viewed as an ongoing cycle of assessment, implementation, evaluation, and refinement.

From the outset, firms should use surveys, interviews, focus groups, or other feedback mechanisms to understand current mentorship practices, identify gaps, and establish measurable goals. Once a program is underway, these same tools should be used regularly to evaluate outcomes and inform continuous improvements.

Suggested Implementation Timeline

Phase 1: Assess & Plan

Establish a baseline understanding of your organization's mentorship needs by:

- Surveying and conducting focus groups or interviews with employees across career stages to identify challenges and opportunities
- Defining program goals, success measures, and participant expectations
- Developing a mentorship framework that aligns with your firm's culture and business objectives
- Consider co-mentoring or mentor rotations, allowing mentees to benefit from multiple perspectives while reducing dependence on a single mentor
- Build in expectations for two-way mentorship, either as a feature of the program or as a foundational approach

Phase 2: Launch

Implement the mentorship program by:

- Matching mentors and mentees using established criteria
- Providing participants with orientation, expectations, and supporting resources
- Encouraging regular meetings and goal setting
- Monitoring participation and collecting early feedback to identify opportunities for improvement

Phase 3: Evaluate & Improve

Assess the effectiveness of the program through:

- Participant surveys and focus groups
- Reviews of program participation and engagement
- Evaluation of outcomes against established goals
- Updates to the program based on participant feedback and organizational needs



Following the initial implementation period, continue this cycle of assessment, refinement, and evaluation to ensure the program remains relevant and effective.

Implementing and Refining Your Program

A successful formal mentorship program evolves over time. Regular evaluation helps ensure mentor-mentee relationships remain productive and that the program continues to meet the needs of both participants and the organization.

Pilot the Program

Consider launching the program with a small group before expanding firmwide. A pilot allows you to validate your matching process, identify administrative challenges, and gather participant feedback before broader implementation.

During the pilot, evaluate:

- How well mentor-mentee pairings align with participants' professional goals
- The effectiveness of communication and working styles within each pairing
- Whether participants have the resources and support needed to succeed

Monitor Program Health

Establish regular checkpoints throughout the mentorship cycle to identify successes and address concerns early. Useful evaluation methods include:

- Short pulse surveys following key milestones
- Anonymous feedback forms
- Facilitated group discussions or advisory panels
- Structured reflection opportunities for mentors and mentees
- Periodic review meetings to identify trends and implement program improvements

Support Mid-Course Adjustments

Not every mentoring relationship will be the right fit. Building flexibility into the program helps maintain participant engagement while reducing the stigma of changing pairings. Consider incorporating the following practices:

- Create a straightforward, confidential process for requesting a new mentor or mentee
- Offer a “pause and reassess” option before rematching participants
- Schedule midpoint conversations to review progress and update development goals
- Conduct routine check-ins to identify concerns before they become barriers

Program Management Tools

Various software tools can help firms manage mentor matching, participant communication, and program administration. The best solution depends on your firm's size, budget, and existing technology infrastructure. Some examples (as of September 2026) include:

- Together platform: Provides automated mentor matching, participant management, and program analytics.
- Mentorloop: Offers customizable matching criteria, participant tracking, and reporting tools.
- Existing firm systems: Smaller firms may successfully manage mentorship programs using existing tools such as Microsoft Excel, Deltek Vision, or other internal databases and project management systems, providing a cost-effective alternative to dedicated mentorship software.