Within any mentoring program, successfully matching and pairing mentors and mentees is critical. What steps can program managers take to ensure compatible, long-lasting pairs that not only benefit one another but help the organization as a whole achieve its goals? Here are our 5 best-practices for matching and pairing, based on our 20 years of experience helping organizations implement successful mentoring programs:

1. **Identify the specific business objective you want to achieve with your mentoring program.** The business objective will determine the matching criteria that are most important for a given program. In truth, there is no one universal set of matching criteria that will generate ideal pairs for any program. With mentoring, one size doesn’t fit all, and each objective will warrant a unique set of criteria. For example, if the business objective is focused on building leadership competencies, match mentees that have specific competency gaps with mentors who are strong in those unique competencies. Say you identify that “strategic influencing,” “empowering others” and “contextual awareness” are 3 critical competencies to be improved through a mentoring program. Make sure then that “developmental need” is a top priority criterion, so that mentees who are looking to specifically improve their “contex-
tual awareness” can be paired up with mentors who have demonstrated proficiency in this area. The same goes for each respective competency. Perhaps most importantly, using a specific business objective to define matching criteria helps avoid the unwanted: matches based on personality traits and “similarity” alone – rather than on developmental goals.

2 Roll out a formal application process to capture key data. Provide role profiles to your mentors and mentees, so they have a clear understanding of what is expected and what they are committing to. As for any important role or responsibility, only recruit mentors and mentees who are suited for your particular program and who are fully committed to the partnership. To do this, create application forms for both mentors and mentees, and use these forms to ask questions that capture data needed to assist matching and pairing. Such data could include not only specific criteria themselves, but additional data that could assist a final matching decision if there is more than one possible match.

3 Do not include “too many” criteria. In theory, matching individuals based on as many criteria as possible will produce better matches. In practice, however, matching on too many criteria is at best time-consuming and at worst unfeasible. Instead of aiming for the “perfect match”, which will limit your ability to match at all – aim for the “best possible match”.

4 Establish a matching process that fits your program’s needs. Once you select the best criteria, determine how the physical matching and pairing will take place. Will the program manager or administrator generate the pairs and then notify individuals of their mentor or mentee? Will mentees choose their own mentors based on these criteria, or vice versa? If mentors and mentees choose each other in a self-matching process, how will you ensure that all mentors and mentees are matched in a timely fashion, and that no individual is left out of the process? Make sure to answer these types of questions in order to establish a sound matching process.

5 For large mentoring programs, use an online matching and pairing tool to generate matches. To clarify, we would define a “large” population to be approximately 100 individuals and above (50 mentors and 50 mentees). For this population size, manual matching and pairing done on paper or using Excel can be tedious and time-consuming with a large mentor-mentee population. Moreover, as time goes on, the margin of error in manual matching is very likely to increase due to fatigue, restlessness and other very “human” factors. In this situation, use an online matching and pairing tool to facilitate either administrator-led matching, self-conducted matching, or better yet- both.

For more information on how Insala can assist with your mentoring initiatives visit www.insala.com