Getting Started
Designing your
signup form and
matching criteria

Mentorloop

Introduction

This guide is your go-to playbook for designing your signup form and matching criteria to run a successful mentoring program with Mentorloop. It helps you as the Program Coordinator (PCs):

- **Create intentional signup forms** that align with your program goals while balancing matching and reporting needs.
- **Provide meaningful mentoring experiences** for all participants.
- **Understand best practices** and make informed program decisions

Your **sign up form is key to launching your program on Mentorloop,** as it serves as the entry point to anyone looking to join.

As Program Coordinator, your signup form gives you insight into participants' goals, experience, and preferences of your participants, ensuring matches are meaningful and aligned with program objectives.

💡The **signup form powers the matching process** for all match types:

- Manual Match
- Self Match,
- **Smart Match algorithm**

Simple guiding principles for signup forms:

Matching

- Your answers help the algorithm find the best match
- Pick questions that reflect how participants should be paired
- Keep it simple- **up to 4 matching criteria** for fairness
- You don't need to match on everything; f**ocus on what will make the mentoring relationship meaningful.**

Reporting

- Ask questions that provide insight into your program outcomes.
- Include questions that can track participant growth, engagement, and satisfaction over time.
- Think about what data will help you evaluate and improve your program year on year.

💡 Balance between collecting enough information for equitable matches and keeping the form easy for participants to complete!

💡Use **clear, concise language** so participants understand why each question matters

💡 Review your form periodically to ensure it reflects your evolving program goals

Quick Start: **Your Mentoring Sign-Up Form**

Step 1: Keep it simple

Ask only what you really need for matching and reporting

Aim for 4 or fewer matching criteria for fairness and better results

Use clear, short questions so participants know why you

Step 2: Choose your matching criteria

Required = must match on this (e.g. goals, skills)

Strongly Preferred = match if possible (e.g. industry, location)

Nice to Have = only match if easy (e.g. department, meeting style)

Step 3: Pick a template (optional)

Choose the one closest to your program type and tweak it:

Corporate – internal staff development

University – connect students with alumni or industry

Industry Association – connect members for skills & networking

Community/NFP – support personal development or career change

Reverse Mentoring – junior mentors, senior mentees

Peer-to-Peer – peers learning together

Group Mentoring – one mentor with many mentees

Step 4: Test your form

Fill it out yourself to check clarity

Make sure each question links to a matching or reporting need

Share with your Customer Success Manager for quick feedback

Signup Form: **Corporate Mentoring**

The Corporate Mentoring theme is great if you're running a program for the first time - especially if your program has multiple goals. It is a go-to for **internal company mentoring programs** that aim to connect employees, boost skills development and knowledge sharing, or strengthen cross-department relationships.

Signup Form Template

[You can preview the Corporate Mentoring signup form here,](#) which include real examples from corporate programs that have tailored company-specific capabilities and focus areas.

Setting up the Smart Match Algorithm

With support from the Mentorloop Customer Success team, Program Coordinators can set up matching rules **before participants sign up**, provided you know how you want to match mentors and mentees.

> 1️⃣ Use Mentorloop's standard sign-up questions (role, goals, experience, location).
>
> 2️⃣ Customise them to fit your culture, values, and priorities.

Matching rules	Match Preference	Priority
Goal alignment	Same goals	✅ Required
Skills alignment	Same skills	✅ Required
Experience	Senior mentor	👍 Strongly Preferred
Meeting frequency (weekly, monthly, quarterly etc)	Same values	🙂 Nice to Have
Department	Different departments	🔹 Low Priority

> Reminder: When participants register, the algorithm uses a range of criteria that is found in their profiles. The criteria can be assigned a level of priority for each match rule using the following:
>
> ✅ Required 👍 Strongly Preferred 🙂 Nice to Have 🔹 Low Priority

Signup Form: University Mentoring

A University Mentoring theme works well for programs **connecting students with alumni or industry professionals.** It's ideal for guiding students through career exploration, preparing them for the transition into the workforce, and helping them build valuable professional networks.

Signup Form Template

[You can preview the University signup form here,](#) including examples from current University mentoring programs.

Setting up the Smart Match Algorithm

With support from the Mentorloop Customer Success team, Program Coordinators can set up matching rules **before participants sign up**, provided you know how you want to match mentors and mentees.

> 💡 **Tip**: Great for programs with mixed goals — like building student confidence, offering real-world insights, and fostering career connections.

Matching rules	Match Preference	Priority
Goal alignment	Same goals	✅ Required
Skills alignment	Same skills	✅ Required
Career/Industry alignment	Same values	👍 Strongly Preferred
Area of Study/Discipline	Same values	👍 Strongly Preferred
Location	Same or flexible	🙂 Nice to Have
Meeting preference (on campus or online etc)	Same or flexible	🙂 Nice to Have

> 💡 At Mentorloop, we've seen university programs match differently depending on their goals: career-focused programs used "**Career/Industry alignment**", while networking or buddy programs leaned on "**Area of Study/Discipline.**"

> ✅ Required
>
> 👍 Strongly Preferred
>
> 🙂 Nice to Have
>
> 🔹 Low Priority

Signup Form: Industry Association

An industry association theme is designed to **connect members of a professional industry body** for skill-sharing, career advancement and expanding professional networks. It **provides members with added value to their membership experience.**

Signup Form Template

[You can preview the Industry Association Signup form here,](#) including examples from current industry mentoring programs.

Setting up the Smart Match Algorithm

With support from the Mentorloop Customer Success team, Program Coordinators can set up matching rules **before participants sign up**, provided you know how you want to match mentors and mentees.

> 💡 **Tip**: This theme works well for **both traditional and peer mentoring** for industry professionals.

Matching rules	Match Preference	Priority
Goal alignment	Same goals	✅ Required
Skills alignment	Same skills	✅ Required
Industry alignment	Same values	👍 Strongly Preferred
Location	Same or flexible	🙂 Nice to Have
Meeting preference (in person, online, hybrid etc.)	Same or flexible	🙂 Nice to Have

> 💡 Encourage matches that can **broaden professional networks** whilst maintaining **relevance to career goals**

> ✅ Required
>
> 👍 Strongly Preferred
>
> 🙂 Nice to Have
>
> 🔹 Low Priority

Signup Form: **NFP/Community**

The NFP or Community mentoring theme **supports individuals in career transition, underrepresented groups, or those seeking personal development.** It focuses on empathy, lived experiences and target skill-building.

Signup Form Template

[You can preview the Community NFP here,](#) including examples from current NFP/community mentoring programs.

Setting up the Smart Match Algorithm

With support from the Mentorloop Customer Success team, Program Coordinators can set up matching rules **before participants sign up**, provided you know how you want to match mentors and mentees.

> 💡 Tip: Connect participants around **shared causes or skills** whilst considering availability and location for **practical engagement**

Matching rules	Match Preference	Priority
Goal alignment	Same goals	✅ Required
Skills alignment	Same skills	✅ Required
Industry/Career alignment	Same values	👍 Strongly Preferred
Location	Same or flexible	👍 Strongly Preferred
Meeting preference (in person, online, hybrid etc.)	Same or flexible	👍 Strongly Preferred
Meeting frequency (weekly, monthly, quarterly etc)	Same values	👍 Strongly Preferred

✅ Required 👍 Strongly Preferred 🙂 Nice to Have 🔹 Low Priority

Signup Form: **Reverse Mentoring**

Reverse mentoring theme is a one-to-one mentoring relationship where the **mentoring roles are switched** to have the **more "junior" employee as mentor,** to **provide guidance and insights to the senior employee**.

Programs often match junior employees with senior leaders to **share insights on tech, trends, or generational perspectives.**

Signup Form Template

[You can preview the Reverse Mentorloop form here,](#) along with real examples from programs that have facilitated a reverse mentoring program.

> 💡 **Reverse Mentoring in Action**
>
> Mentorloop customers have successfully run reverse mentoring programs **by requiring participants to enter their years of experience first, which determines whether they join as a mentor or mentee.** This approach—used across multiple programs—**helps set clear roles and expectations from the start.**

Setting up the Smart Match Algorithm

With support from the Mentorloop Customer Success team, Program Coordinators can set up matching rules **before participants sign up**, provided you know how you want to match mentors and mentees.

Matching rules	Match Preference	Priority
Goal alignment	Same goals	✅ Required
Skills alignment	Same skills	✅ Required
Department preference	Same or flexible	👍 Strongly Preferred
Experience	Junior Mentor	✅ Required

✅ Required 👍 Strongly Preferred 😀 Nice to Have 🔹 Low Priority

Signup Form: **Peer to Peer Mentoring**

This theme can connect participants with similar levels to share knowledge, hold each other accountable, and problem solve together. It's **particularly effective for professional association or organisations with a culture of collaboration.**

Signup Form Template

This theme is [flexible with any signup form questions in the template.](#)

Setting up the Smart Match Algorithm

With support from the Mentorloop Customer Success team, Program Coordinators can set up matching rules **before participants sign up**, provided you know how you want to match mentors and mentees.

💡 The **key difference lies in the mentoring roles:** for a peer-to-peer program, simply change the labels as **"Peer mentor"** and **"Peer mentee"** and provide clear instructions to participants when they join.

💡 **Peer to Peer Mentoring in Action**

Across several programs, participants are matched **based on shared roles, interests, or challenges,** encouraging mutual support and collaborative learning. Mentorloop's structure makes it easy to define these priorities upfront.

Matching rules	Match Preference	Priority
Goal & skills alignment	Same goals	✅ Required
Industry/Career alignment	Same values	✅ Required
Location	Same or flexible	👍 Strongly Preferred
Meeting preference (in person, online, hybrid etc.)	Same or flexible	👍 Strongly Preferred
Meeting frequency (weekly, monthly, quarterly etc)	Same values	🙂 Nice to Have

✅ Required 👍 Strongly Preferred 🙂 Nice to Have ◆ Low Priority

Signup Form: Peer to Peer Mentoring

This theme can connect participants with similar levels to share knowledge, hold each other accountable, and problem solve together. It's **particularly effective for professional association or organisations with a culture of collaboration.**

Signup Form Template

This theme is flexible with any signup form questions in the template.

Setting up the Smart Match Algorithm

With support from the Mentorloop Customer Success team, Program Coordinators can set up matching rules **before participants sign up**, provided you know how you want to match mentors and mentees.

💡 The **key difference lies in the mentoring roles:** for a peer-to-peer program, simply change the labels as **"Peer mentor"** and **"Peer mentee"** and provide clear instructions to participants when they join.

💡 Peer to Peer Mentoring in Action

Across several programs, participants are matched **based on shared roles, interests, or challenges,** encouraging mutual support and collaborative learning. Mentorloop's structure makes it easy to define these priorities upfront.

Matching rules	Match Preference	Priority
Goal & skills alignment	Same goals	✅ Required
Industry/Career alignment	Same values	✅ Required
Location	Same or flexible	👍 Strongly Preferred
Meeting preference (in person, online, hybrid etc.)	Same or flexible	👍 Strongly Preferred
Meeting frequency (weekly, monthly, quarterly etc)	Same values	🙂 Nice to Have

✅ Required 👍 Strongly Preferred 🙂 Nice to Have ◆ Low Priority

Signup Form: Group Mentoring

Group mentoring connects **one mentor with several mentees (or multiple mentors with multiple mentees).** This is ideal when you want to **maximise mentor reach, encourage group discussions** and create a collaborative learning environment.

💡 Team-based growth: Groups are formed around **shared goals, projects, or skill areas** to encourage collaborative learning and networking.

Signup Form Template

This theme is flexible with any signup form questions in the template.

Setting up the Smart Match Algorithm

With support from the Mentorloop Customer Success team, Program Coordinators can set up matching rules **before participants sign up,** provided you know how you want to match mentors and mentees.

💡 Group Loops in action

If your Groups are designed for one mentor to work with multiple mentees, the following is required:

- **Running the Smart Match Algorithm multiple times:** once for each mentee you want to connect with the mentor.
- **Check the Loops page** – these matches will appear as individual 1:1 draft loops.
- **Create your Group Loops** – combine the relevant 1:1 loops into a single Group Loop.

Your Mentorloop Customer Success Manager can guide you through your first matching process and ensure everything runs smoothly. You won't have to navigate it alone.

Matching rules	Match Preference	Priority
Goal & skills alignment	Same goals	✅ Required
Industry/Career alignment	Same values	✅ Required
Location	Same or flexible	🙂 Nice to Have
Meeting preference (in person, online, hybrid etc.)	Same or flexible	🙂 Nice to Have
Meeting frequency (weekly, monthly, quarterly etc)	Same or flexible	👍 Strongly Preferred

✅ Required 👍 Strongly Preferred 🙂 Nice to Have 🔹 Low Priority

Summary

In this playbook, we've explored how you can **design an effective signup form and select matching criteria** that sets your mentoring program up for success — from choosing the right questions to limiting your criteria for fair, strong matches.

However you decide to design and launch your signup form, we hope this guide has given you clarity and confidence to create a simple, effective entry point for your participants, while giving you the data you need for matching and reporting.

What's next?

- Review your current signup form questions
- Refine your matching criteria (limit to max 4)
- Share your updated form with your Customer Success Manager for feedback and advice

Need More Help?

💬 Contact your Customer Success Manager to workshop your signup form or matching rules.

📚 Explore the Help Hub for guides, tips, and FAQs:

mentorloop.com

Mentorloop