Program Management Playbook:
Templated Communications

Mentorloop

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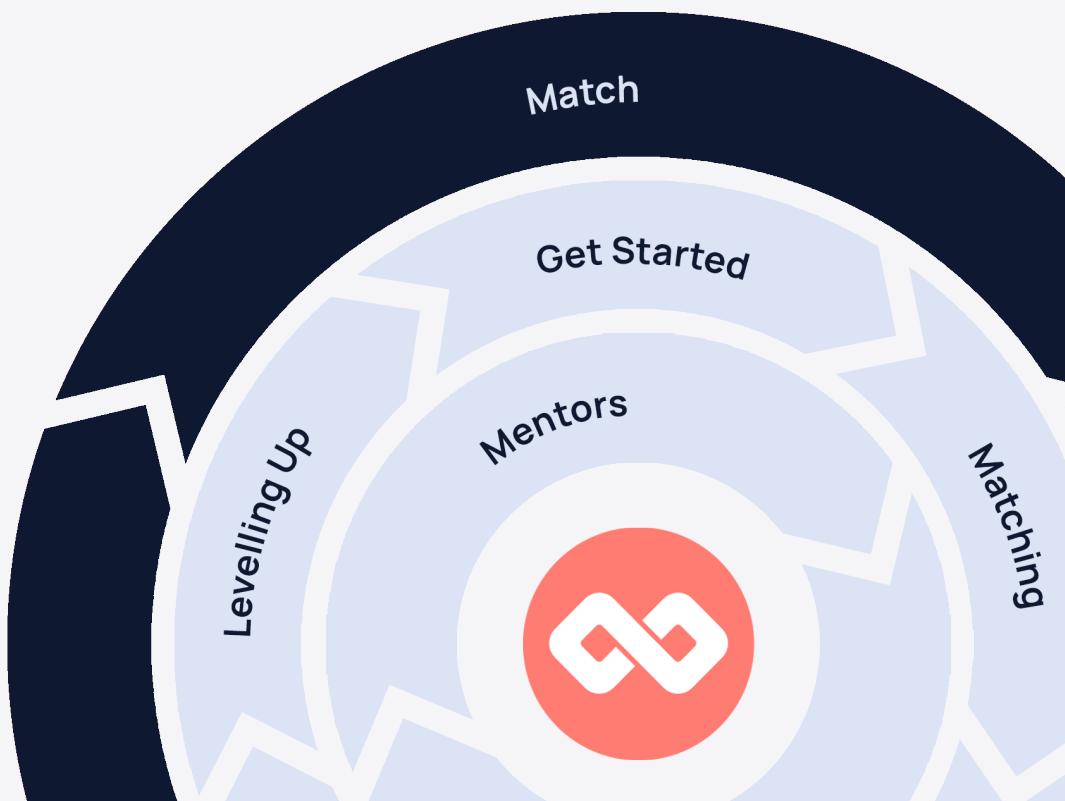
Mentorloop Milestones

Milestones are a great way to track your participants' progress over time. Encouraging participants to complete these milestones can help them get the most out of their mentoring experience.

Filtering Participants by Milestone
1. Navigate to your Participants page.
2. Filter by Mentoring Milestone and select the relevant milestone(s).

Communicating with Participants
Use these message templates provided to guide your communications and encourage milestone completion.

Understanding Milestones
Milestones are automated checkpoints based on where participants are in their mentoring relationships. They help participants track progress and enjoy a more structured mentoring experience.

💡 *Tip: Encouraging participants at each stage ensures they remain engaged and supported throughout their mentoring journey.*

Milestones in the PC Dashboard
Your PC Dashboard gives you a clear overview of participant progress based on milestones.
- Hover over a milestone to see how many participants/loops may need extra support or a nudge.
- You'll also receive prompts to manage participants who remain in the same milestone for over 21 days.

Matched - - - - - - - - - - **First meeting** - - - - - - - - - - **Growing together** - - - - - - - - - - **Levelling up**

Hurray! you have found a match

It's time to schedule that all-important first meeting.

Most of your mentoring relationship will take place in this milestone, and we'll occasionally ask you for feedback.

You've completed a number of mentoring milestones to build a mature mentoring relationship.

✓ Complete when you find a match

✓ Complete when you complete the survey after your meeting

✓ Complete it after giving and receiving at least one positive feedback (MQS)

✓ Complete it after sharing your journey, closing your loop or achieving all your proposed goals

Mentorloop Milestones: Matching

Matching is the first step in your participants' mentoring journey. Clear guidance helps them progress smoothly and makes it easier for you to track and support their progress.

Both mentors and mentees should understand how to find a match and what to expect once they've joined your program.

Recommended Resources to send participants in this milestone!

Resources for **all matching types:**

[Update your profile](#)

[Account Settings & Integrations](#)

[Connect your calendar and set your availability](#)

[How to find a match](#)

[Mark yourself as unavailable](#)

Recommended resources for **self matching**

[Finding your Mentee: A Self Match Guide for Mentors](#)

[Finding your Mentor: A Self Match Guide for Mentees](#)

[How to use Recommended Matches](#)

Matching: Smart Match

Below are sample communications that you can send to participants via the bulk message functionality in Mentorloop, to inform participants of the matching process.

Recommended resources for Program Coordinators:

- How to send a message to my participants?
- How to filter my participants in Mentorloop?

💡Tip: You can be intentional with your message **by filtering based on mentor or mentee roles** so that you can provide specific instructions to each role and set expectations early on.

Smart Match Message Templates

Hi {firstName},

Thank you for joining [insert your mentoring program name], we are excited to get you connected with your mentee.

In the next week, we'll be matching you with your mentoring connection. We are using the Smart Match Algorithm based on criteria that you've provided on your mentoring profiles.

Before your match is revealed, please ensure that you have:
1. *Review your mentoring profile and goals and preferences from your profile settings.*
2. *Connected your calendar and your MS teams video/Zoom account to ensure a seamless connection when you and your match schedule your first meeting!*

Stay tuned — exciting connections are coming soon!

Hi {firstName},

We've noticed some new participants join the program and as a result we will be running another round of matching on [DATE]! Stay tuned as you will soon be matched with a new mentor/mentee!

We hope you are able to make the most out of this mentorship!

Matching: Self Match

Below are sample communications that you can send to participants via the bulk message functionality in Mentorloop, to educate participants on how they can find their own match!

Recommended resources for Program Coordinators:

- [How to send a message to my participants?](#)
- [How to filter my participants in Mentorloop?](#)
- [How do participant self match?](#)

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Self Match Message Template

Hello [First Name],

It's time to take charge of your mentoring journey! With self-matching available on Mentorloop, you can decide who you'd most like to connect with.

*Think about what you'd like to learn or share, then browse through profiles and request the connection that excites you most. The earlier you jump in, the more options you'll have to choose from. **Resources to help you:***

🌱 *[Self Match Guide for mentees](#)*

🌟 *[Self Match Guide for mentors](#)*

Remember, mentoring works best when you feel a spark of connection — so follow your instincts!

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First Meeting Milestone – Action Recommended

Hi {firstName},

*I've noticed that it's been over **21 days since you joined the program,** and you haven't yet found a match using the Self Match feature. Sometimes it can feel tricky to know how to start or reach out to a mentor/mentee — I'm here to help!*

I can guide you through the matching process, offer tips on connecting, or answer any questions you might have. Would you like some support to help you get matched?

Would you like me to provide some support to help you get matched?

Looking forward to hearing from you,

💡Tip: Your Dashboard will provide an alert if participants have not progressed in their Milestones:

⚠️ 10 Loops have been in **First meeting** for over 21 days
Manage >
Learn more

Matching: Manual Match

Below are sample communications that you can send to participants via the bulk message functionality in Mentorloop to inform them about the manual matching process.

> 💡Tip: You can be intentional with your message **by filtering based on mentor or mentee roles** so that you can provide specific instructions to each role and set expectations early on.

Manual Match Message Templates

Mentee Template

Hi {firstName},

We're currently reviewing participant profiles and will be matching you with a mentor soon. Once your match is confirmed, you'll receive an email with all the details and next steps.

In the meantime, you can explore our helpful resources on how to get the most out of being a mentee 👈

Before your match is revealed, please ensure that you have:
1. *Review your mentoring profile and goals and preferences from your profile settings.*
2. *Connected your calendar and your MS teams video/Zoom account to ensure a seamless connection when you and your match schedule your first meeting!*

Mentor Template

Hi {firstName},

We're currently reviewing participant profiles and will be matching you with a mentee soon. Once your match is confirmed, you'll receive an email with all the details and next steps.

In the meantime, you can explore our helpful resources on how to get the most out of being a mentor 👈

Before your match is revealed, please ensure that you:
1. *Review your mentoring profile and goals and preferences from your profile settings.*
2. *Connected your calendar and your MS teams video/Zoom account to ensure a seamless connection when you and your match schedule your first meeting!*

Mentorloop Milestones: First Meeting

The First Meeting milestone marks an important stage in your participants' mentoring journey. Once matched, mentors and mentees are encouraged to schedule their first meeting to get to know each other, discuss expectations, and set goals for their relationship.

Clear guidance at this stage helps participants feel confident, reduces hesitation in reaching out, and ensures their mentoring relationships get off to a strong start.

Recommended Resources to send participants in this milestone!

- First Meeting Checklist for Mentees
- First Meeting Checklist for Mentors
- The Mentoring Agreement
- Understanding Mentoring Milestones
- 6 Mentoring Meeting Agendas
- The Goal Setting Framework

Milestone: First Meeting

Below are sample communications that you can send to participants via the bulk message functionality in Mentorloop, to inform participants of the First Meeting milestone and help them progress.

> 💡 Tip: When you create and make a new loop live, participants will be notified by email that they've been matched. You can set the default subject and message in **Program Settings › New match email notification.**

First Meeting Message Templates

Hi {firstName},

*We've noticed you're still on your **first meeting milestone**. Below I've provided some tips and articles to support you in reaching out to your mentoring match and progress forward.*

[Schedule your first meeting](#) with your match via your 1:1 loop. If you are unsure what to discuss - there is a First Meeting agenda ready and waiting for you both! We can't wait to hear how your first catch-up goes - don't forget to provide feedback post meeting to progress through the next milestone!

💡 Tip: Start to think about the goals you want to achieve and how your match might be able to assist.

Reach out if you need help!

Thanks,

....

Hi {firstName},

***We've noticed you have yet to connect with your match for a first meeting for over 21 days.** The first conversation is an important milestone — it sets the tone and helps you get the most out of your mentoring journey.*

Here are a few tips to help you get started:
👉 Send a quick hello message to your mentoring partner if you haven't already
👉 Suggest a time for your first meeting (coffee, call, or online meeting)
👉 Use Mentorloop's calendar integration to make scheduling easy
👉 Explore 6 Mentoring Meeting Agendas to structure your sessions effectively: [6 Mentoring Meeting Agendas](#)

Taking the first step will help you build momentum and set you both up for a rewarding mentoring experience.

Mentorloop Milestones: Grow Together

The Grow Together milestone represents the stage where mentoring relationships begin to build momentum. During this stage, mentors and mentees meet regularly, share experiences, and work towards their goals.

Providing encouragement and structure helps participants stay engaged, reflect on progress, and get the most value out of their mentoring relationship.

As a Program Coordinator, you can support participants in the Grow Together milestone by **sharing useful reminders or resources that help keep mentoring front of mind.**

Recommended Resources to send participants in this milestone!

- [Documenting your mentoring journey](#)
- [Why reciprocity improves your mentoring relationship](#)
- [Intentional Mentoring Time](#)
- [Goal Setting Resources](#)

Regular communication at this stage is key to maintaining momentum and ensuring mentoring relationships continue to thrive.

Milestone: Grow Together

Below are sample communications that you can send to participants that are in the Grow Together Milestone, via the bulk message functionality in Mentorloop. Help boost participant momentum by encouraging ongoing mentoring sessions.

> 💡 Tip: Participants progress past the Grow Together Milestone once they have **received and provided a positive feedback, via the** [Mentoring Quality Score Survey.](#)

Grow Together Message Templates

Hi {firstName},

I hope both you and your mentoring match are having a great journey so far. How's everything going?

Just a quick reminder, please continue [documenting your mentoring experience.](#) Your records not only benefit you but also **play a crucial role in the success** of your overall experience in the program!

[Don't forget to book your recurring meeting](#) and s**hare your valuable feedback by responding to the MQS Survey to progress to the next milestone.** Your input is valuable to us, and it helps to see if any additional assistance is required!

If you're in need of inspiration, the [Mentorloop Help Hub](#) or [Blog](#) is there to assist!

Thanks,

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Hi {firstName},

We've noticed you've been in the **Grow Together stage for a little while.** To move forward, you and your mentoring partner can provide positive feedback on your experience through your Mentorloop 1:1 Loop..

In the meantime, staying consistent with your catch-ups is key. Here are some ideas for your next meeting:

👉 Share updates on your goals
👉 Reflect on what's been working well so far
👉 Try one of these [Mentoring Meeting Agendas](#) for fresh conversation starters

If you need any help or have questions, just reply to this message — we're here to support you!

Mentorloop Milestones: Levelling Up

The Levelling Up milestone marks the stage where participants have completed several mentoring milestones and built a strong, mature mentoring relationship.

After spending some time in this stage, participants may also consider finding another match to build out their personal advisory board, engaging in another style of mentoring, or even stepping up from mentee to mentor.

Participants complete this phase by either sharing their journey on LinkedIn or achieving all the goals they've set within their Loop. As a Program Coordinator, you can encourage participants to complete their milestones and work towards their Mentoring Certification, recognising their growth and achievements.

Recommended Resources to send participants in this milestone!

- Levelling Up in your Mentoring Journey
- How to ask for feedback from your mentee
- Giving your mentee SMART feedback
- 3 tips for making the most out of your mentoring relationship

Milestone: Levelling Up

Below are sample communications that you can send to participants that are in the Levelling Milestone, via the bulk message functionality in Mentorloop.

Use these messages to help boost participant momentum by encouraging them to reflect on their progress, expand their goals, and continue building on the strong foundation they've already created.

> 💡 Tip: Participants can complete the Levelling Up milestone by either **sharing their journey on LinkedIn or by achieving all the goals they've set within their Loop.** Encourage them to reflect on their progress and celebrate their growth!

Levelling Up Message Templates

Hi {firstName},

Great news, you're so close to getting your official Mentoring Certification!

How can you complete the Milestone?
The milestone is complete once you've shared your journey on LinkedIn or you've achieved all goals set in your 1:1 loop with your mentoring match!

What is the Mentoring Certification?
It's about the process, commitment and dedication to learning. So whether you're a mentor or a mentee, once you have completed your mentoring journey, you can become Mentorloop certified by adding a badge to your linkedin profile!

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Hi {firstName},

Reaching the Levelling Up milestone means you've already achieved so much in your mentoring journey — well done! Now's the perfect time to:

👉 *Reflect on what's been most valuable in your relationship*
👉 *Explore new goals or skills with your mentoring partner*
👉 *Consider expanding your mentoring experience by finding another match or stepping up into a new role (like moving from mentee to mentor).*

*Remember, you can **complete this milestone by either sharing your journey on LinkedIn or by achieving all your goals within your Loop.***

Keep pushing forward — you're well on your way to Mentoring Certification!

Maintain Momentum

Maintaining momentum is key to keeping your participants engaged and ensuring they continue to get value from their mentoring relationships.

Sentiment
The Sentiment page allows you to track the progress of your program. You are able to keep a pulse on how your participants are going and help out in real-time!

Loop Activity
The Loop page gives you insight into how often participants are meeting, messaging, or interacting in their mentoring relationships. Staying on top of loop activity helps you ensure relationships remain active and meaningful.

Goals
The Goals page lets you monitor how participants are progressing with the goals they've set in their Loop. You can easily spot who may need a nudge and provide support to keep their mentoring journey on track!

Mentoring Initiative

Reverse Mentoring Challenge
If you're running a Reverse Mentoring initiative, it encourages participants to share fresh perspectives, challenge assumptions, and strengthen inclusion. **Regular communications help maintain momentum**, provide guidance, and ensure the mentoring relationship remains productive and valuable for both participants.

Group Mentoring
Group Mentoring brings multiple participants together in a shared learning environment. If you're running a Group Mentoring initiative, be sure to **encourage open discussion, collaboration, and peer-to-peer learning.** Regular communications help maintain momentum, foster participation, and ensure the group remains active and meaningful.

Maintain Momentum: Sentiment

The Sentiments Page highlights qualitative feedback from participants across three surveys: **the Mentoring Quality Score, Post-Meeting Survey, and Close Loop Survey.** Use the filters to identify participants who may need extra support.

Below are example messages you can send based on common reasons highlighted on the Sentiments Page.

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"Haven't Met Yet" – commonly reported in the Mentoring Quality Score survey

Hi (Name),

I noticed you haven't met your mentoring match yet. It can feel a little intimidating to reach out, especially if this is your first mentoring experience!

Mentorloop has some great resources to help you prepare:
- *How to be an awesome mentee*
- *First meeting checklist for mentees*
- *Schedule your meeting*

Try stepping outside your comfort zone and schedule a meeting with your match!
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"No Time" – often noted when participants close their loop due to time constraints

Hi (Name),

I noticed you recently closed your loop with [Name] due to lack of time. I completely understand—things can get busy, and sometimes we need a pause.

If you'd like, you can temporarily mark yourself as unavailable in your profile settings (top right corner). This will:

Stop match requests from being sent to you

Pause any manual matches from the Program Coordinator

You can make yourself available again whenever you're ready to participate.

Thanks,
(Program Coordinator)

Maintain Momentum: Sentiment

Increasing Sentiment Responses: Mentoring Quality Score

When a participant is matched, they automatically receive their first Mentoring Quality Score (MQS) survey 30 days after the match goes live. This survey captures valuable insights into their first impressions and initial mentoring experience.

To encourage more responses:

- Review responses at least two weeks after the 30-day mark to see what feedback has come through.
- Follow up with participants who haven't submitted their MQS to gently encourage them to share their thoughts.

Regularly checking and encouraging feedback helps you understand how participants are going and ensures any support needs are addressed early.

To identify participants who haven't submitted feedback:

- *Go to your Sentiment page.*
- *Bulk select all participants who have submitted feedback and and tag the responder and name the tag with: 'Received MQS feedback'.*
  - *This tag helps track who has provided feedback across your program.*

- *Go to your Participants page and filter by: Tags (not in): 'Received MQS feedback'*
  - *This will give you a list of participants who haven't submitted feedback.*

Send them a gentle reminder:

Hi {firstName},

I noticed you haven't yet provided feedback on your mentoring experience.

Please take a moment to share how valuable your partnership or experience has been via your dashboard—it only takes one click!

Happy mentoring!
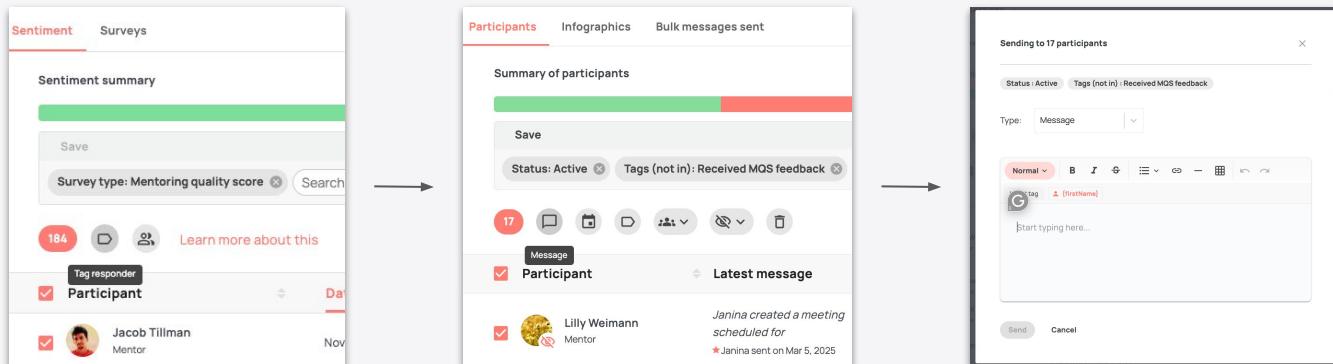
Maintain Momentum: Sentiment

"Mentoring connection has left the program"

Hi,

I noticed that your mentoring match, (Name), has left the program, and you haven't been re-matched yet.

If Self-Match is enabled:

You can find a new match anytime by going to the 'Find New Matches' tab and filtering for participants based on your preferences.

If manual matching:

If you'd like me to help find a new match, please let me know any specific skills or goals you want to focus on during the program. I'll help connect you with an available participant.

Thanks,

"Not suitable"

I'm sorry to hear that your mentoring match wasn't suitable. Could you share a bit about why it didn't work? This will help me find a better match for you.

If Self-Match is enabled:

You can browse potential matches via the 'Find New Matches' tab and filter by your preferences.

If manual matching:

If you'd like me to help, let me know the skills or goals you want to focus on, and I'll connect you with a suitable participant.

Thanks,

"No response from mentoring match"

Hi (Name),

I noticed you haven't received a response from your mentoring match. I'm really sorry about this—it can be frustrating!

Would you like me to reach out to see if they're still interested in continuing, or would you prefer to close this loop and find a new match? To close the loop, simply go to your 1:1 Loop with your match and "close the loop" from the top right hand corner of the loop.

Thanks,

Maintain Momentum: Loops

The Loops Page gives you insight into participants' mentoring relationships. It highlights activity such as meetings, messaging, and other interactions. You can quickly spot where connections may be stalling and step in with encouragement or resources.

How to identify inactive loops

There are two ways:

1. **PC Dashboard - Milestones**
   Loops that have been "stuck" for more than 21 days are highlighted under Milestones.
2. **Loops Page - Last Activity Filter**
   Go to your loops page and filter by "Last Activity" and select your chosen date. This will generate a list of loops hat haven't interacted with one another since the match was created.

Once identified, you can **bulk select** the loops and send a reminder message to encourage participation or offer support.

Low or No Activity

Hi {firstName},

I noticed there hasn't been much activity in your mentoring loop with [Match Name]. Regular interaction helps you get the most out of your mentoring experience.

Here are some ways to get started:
- *Send a quick message to check in from your 1:1 Loop*
- *Schedule your next meeting*
- *Share a helpful article, podcast, or resource from the Mentorloop Help Hub*

A small step now can spark meaningful conversations!

No meetings booked

Hi {firstName}.

> 💡 Tip: You can filter by **"Future Meetings"** to identify loops that haven't scheduled their next meeting.

I hope your mentoring journey is going well! I noticed it's been a while since your last meeting with your match. Even a short check in every few weeks can make a big difference.

If scheduling is tricky, try setting a recurring time that works for both of you. You can also <u>connect your calendars</u> *to make it easier to see availability and* <u>book future meetings automatically.</u>

Maintain Momentum: Loops

Mid-Program Check-In: Meetings and Next steps

Hi,

It's been just over a month since we kicked off the mentoring program.

By now, most of you will have had your first meeting (congrats!) and should now be finalising your goals for the program. This will help you and your mentor focus on what you want to achieve, and will help you assess how effective the mentoring has been when the program ends.

If you haven't already done so, please ensure you've booked the next meeting with your mentor. (This gives them confidence you haven't forgotten!)

And for those who scheduled a meeting outside of the Mentorloop platform, please ensure you 'log a previous meeting' in the app so we know where you're at.

Thanks,

Sharing a resource to inspire conversation

Hi {firstName},

I wanted to share a resource that could be useful for your mentoring conversations.

[Insert Link / Resource Title, e.g., "Guide: How to Make the Most of Mentoring Conversations"]

*It includes tips on **setting goals, having meaningful discussions, and making progress toward your professional development**. You might consider reviewing it before your next meeting to get some ideas for topics to discuss.*

Small steps like this can help maintain momentum in your mentoring relationship!

> 💡 Tip: Visit the Mentorloop Help Hub or Blog for resources or if there are other resources that you want to share with your participants that would help to inspire them, you can send those too!

Share Mentoring Champion tips/piece of advice

Hi {firstName},

I hope your mentoring journey is going well! You've been doing a fantastic job staying engaged and making the most of your mentoring sessions.

*We'd love for you to **share one tip or piece of advice** that has helped your mentoring loop stay productive and meaningful. Your insight could really help other mentoring pairs make the most of their experience.*

Simply reply to this message with your tip, and we'll share it with the rest of the participants in the program.

Thanks so much for helping your peers get the most out of their mentoring relationships!

Maintain Momentum: Goals

The Goals Page lets you monitor participants' progress on the goals they've set in their mentoring loops. You can quickly identify who hasn't set goals yet, who may need a nudge, and who might benefit from extra

How to identify goal progress

1. **Goals Page – Created Goals**
   Navigate to the Goals Page to view participants who have created their goals and track their progress or completion status.
2. **Participants Page – No Goals Set**
   To identify participants who haven't yet created a goal, go to the Participants Page and filter by Goals → "No Goals Set."

Once identified, you can bulk select participants and send reminder messages or share resources to encourage them to set, review, or complete their goals.

- -

Encourage Setting Initial Goals

Hi {firstName},

Have you had a chance to set your goals for your mentoring loop with your mentoring match? Goals help you and your mentor focus on what you want to achieve and make your sessions more productive.

You can set and share your goals directly through Mentorloop. Here's a helpful guide to get started: The Mentorloop Goal-Setting Framework

Setting even one goal is a great first step!

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No Goals Set

Hi {firstName},

I noticed that you haven't set any goals within the Mentorloop platform since joining the program and being matched. Setting goals helps guide your conversations and ensures you get the most out of your mentoring experience. Even small goals can make a big difference, for example:

- *Preparing for your next career step*
- *Building confidence in a skill or task*
- *Expanding your professional network*

You can create and share your goals directly in Mentorloop. Here's a helpful resource to get started: Goal Setting Resource

Once your goals are set, your mentor will have a clear understanding of what you'd like to achieve, making your sessions more focused and productive.

Maintain Momentum: Goals

Mid-Program Check-In: Tracking Goals Progress

Hi {firstName},

It's a good time to check in on your mentoring goals with your mentoring match. Are you making progress? Do you need to adjust anything?

Keeping your goals up-to-date in Mentorloop helps both you and your mentor stay on track. If there's anything we can do to provide you with some extra support, please reach out.

Keep up the great work!

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Reminder - Goal Due Date Approaching

Hi {firstName},

*I noticed that one of your mentoring goals with **has a due date coming up soon.** This is a perfect time to review your progress and plan next steps.*

Remember, you can update your goal status and reflect on achievements directly in Mentorloop. Need a little inspiration? Here's a resource on the importance of Reflection and Goal Setting.

Thanks,

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Have your participants written down similar/common goals? Share a resource!

Hi everyone,

We've noticed many participants in the program have been focusing on similar goals, such as [insert common goals, e.g., "career progression, leadership skills, or building confidence in presentations"].

To support you in achieving these goals, we wanted to share this helpful resource: [Insert Resource Link]. It includes tips and strategies that you can apply in your mentoring sessions.

Feel free to explore the resource together with your mentoring match and discuss how you can implement some of the ideas in your own mentoring journey.

Maintain Momentum: Reverse Mentoring

To help maintain momentum and provide your participants with a positive mentoring experience, **consider running a short Reverse Mentoring Challenge.** Some programs incorporate this mid-way through the mentoring journey to mix things up and give mentors and mentees a slightly different structure.

What the challenge involves:

- Encouraging participants to increase their engagement and improve the quality of their mentoring experience.
- Creating an opportunity for both parties to gain valuable insights, hands-on experience, or even develop a new skill.

The challenge is a fun, structured way to reinvigorate mentoring relationships while adding variety and measurable outcomes to the program.

Reverse Mentoring Challenge: Program Coordinator Guide

We've created a **Reverse Mentoring Challenge Guide** that includes a ready-to-use communications plan.

This plan covers everything from promoting the challenge and generating interest, to weekly messages that keep participants informed about requirements and provide key discussion topics.

There's also a **Participant Guide** included, which can be shared throughout the challenge so participants have discussion topics and guidance readily available to make the most of their mentoring sessions.

Mentoring Challenge:
Reverse Mentoring

Program Coordinator's Guide

Mentorloop

Mentoring Challenge:
Reverse Mentoring

Participant Guide

Mentorloop
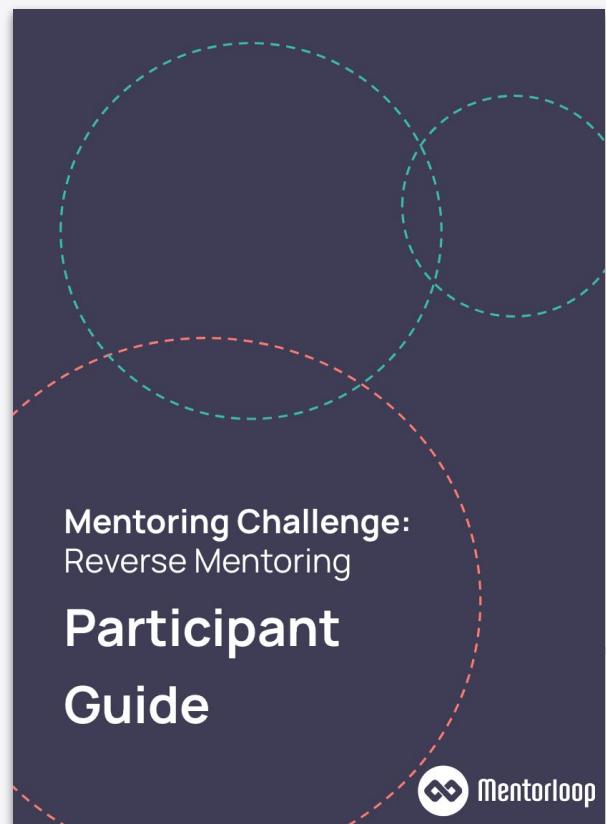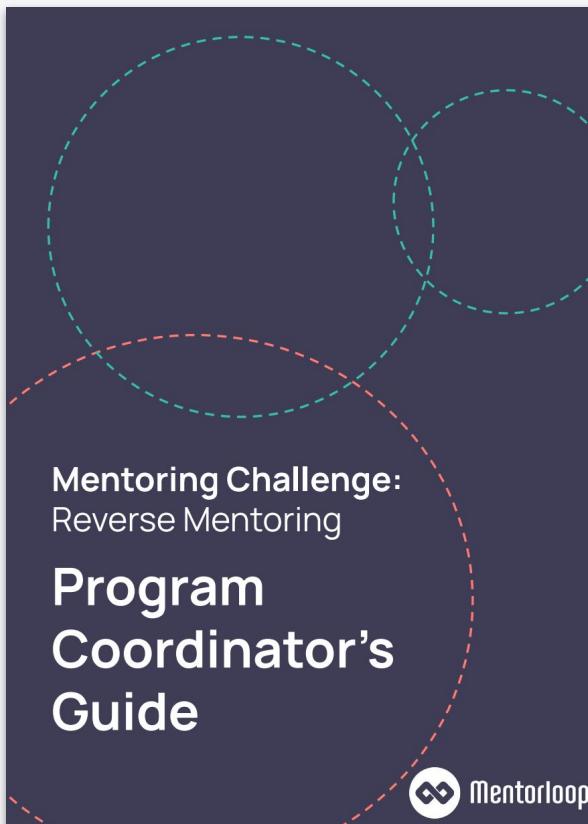
Maintain Momentum: Group Mentoring

To help maintain momentum and provide your participants with a positive mentoring experience, **consider running a Group Mentoring Challenge.** Many programs introduce this mid-way through the mentoring journey to add variety alongside 1:1 mentoring loops.

What the challenge involves:

- Improving a skill that participants want to work on
- Sharing experiences with peers and Key Group Mentors through weekly discussion questions
- Joining dedicated group sessions around Skill Building and hearing from one another

Identify and Invite Your Key Group Mentors

The main difference in running a Group Mentoring Challenge is pre-selecting your Key Group Mentors. These are the most skilled and experienced mentors who guide discussions and support participants throughout the challenge.

Using the Program Coordinator Guide, you'll get step-by-step instructions on how to kickstart the challenge, including:

- Choosing which skill-based groups to create based on the most in-demand skills for your program
- Identifying and inviting your Key Group Mentors to accept their role

Key Group Mentor Guide

The Key Group Mentor Guide provides discussion topics and a clear structure for participants, helping them stay engaged and get the most out of each group session.

Group Mentoring:
Program Coordinator Guide

∞ Mentorloop

Group Mentoring:
Key Mentor Guide

∞ Mentorloop

Maintain Momentum: Monthly Message

Maintaining regular communication with participants is key to keeping mentoring relationships active, meaningful, and productive. To help Program Coordinators stay on top of engagement, we've drafted **12 sample message templates—one for each month of the year.**

These messages cover a wide variety of topics inspired by real-life mentoring programs, including:

- Encouraging regular loop activity and meetings
- Checking in on goals and progress
- Spotlighting mentors or mentees to inspire participation
- Promoting surveys and gathering feedback
- Sharing resources, webinars, and skill-building opportunities
- Rematching participants or preparing them for the next stage of their program

> 💡 Tip: **Whilst not all mentoring programs run on a 12-month cycle, these sample messages can be adapted and used at any point in your program.** You can align the timing, focus, and content to your program's specific timeline, milestones, or participant needs.

Month	Focus / Theme	Bulk Message
January	Kickoff & Goal Setting	*Hi {firstName}, Happy New Year!* 🎉 *A new year is the perfect time to set fresh goals with your mentor/mentee. Take a moment to review your goals in Mentorloop, discuss them together, and plan how you'll achieve them. Starting the year strong sets the tone for a productive mentoring journey.* ✅ *Clear goals help both you and your mentor/mentee focus your time and make the most of each meeting.*
February	Early Engagement	*Hi {firstName},* 🌱 *I hope your mentoring relationship is off to a great start! If you haven't scheduled your next meeting yet, now's a great time.* *Even short, regular check-ins every few weeks can make a big difference. Logging your meetings in Mentorloop helps track progress and keep momentum going.* 📅 *Try using discussion prompts or sharing experiences to deepen your conversations and build a stronger connection.*

Maintain Momentum: Monthly Message

Month	Focus / Theme	Bulk Message
March	Mentor/Mentee Spotlight	*Hi {firstName},* 🌟 *Meet [Spotlight Participant]! They've shared how their mentoring journey has helped them [insert achievement or insight].* *Let their story inspire your own mentoring sessions, and consider sharing a tip or insight from your experience with others.* 💡 *Learning from your peers is a great way to gain fresh ideas and keep your mentoring relationship dynamic and engaging.*
April	Survey Nudge	*Hi {firstName},* 📝 *Your feedback is valuable! Please take a moment to complete the Survey that we've sent through Mentorloop.* *Sharing your thoughts helps improve the program and ensures your experience—and that of your mentor/mentee—is as impactful as possible.* *Your input helps your Program Coordinator support you better and creates a stronger mentoring community.*
May	Skill Focus / Resource Sharing	*Hi {firstName},* 📚 *Many participants are focusing on [common skill, e.g., leadership]. Here's a resource to help you and your mentor/mentee make progress together: [Insert Link].* *Incorporating this into your next meeting could spark valuable discussions and skill development.* 💬 *Using shared resources also encourages collaboration and allows you to learn from each other's experiences.*
June	Mid-Year Check-In	*Hi {firstName},* ⌛ *We're halfway through the year! Take a moment to review your goals in Mentorloop and reflect on your progress.* *Are you on track? Do you need support adjusting them with your mentor/mentee? Mid-year is the perfect time to reset and focus on what matters most for your mentoring journey.* 🔄 *Checking in now ensures you'll finish the year with meaningful achievements and insights to celebrate.*

Maintain Momentum: Monthly Message

Month	Focus / Theme	Bulk Message
July	Loop Activity Engagement	Hi {firstName}, ⚡ I noticed it's been a while since your last meeting with your mentoring match. Even short, regular catch-ups make a big impact. Try scheduling a recurring time that works for both of you and log your meetings in Mentorloop. 📅 Keeping your mentoring momentum is key to a successful relationship. Don't forget to reflect after each session to maximize learning and growth.
August	Mentor/Mentee Spotlight	Hi {firstName}, 🌟 This month we're celebrating [Spotlight Participant]! They've been actively engaging in their loop and sharing insights that others can learn from. Consider sharing your own tips or lessons learned to inspire others and strengthen your mentoring community. 🤝 Spotlight stories are a great way to motivate yourself and your match to try new approaches and stay engaged.
September	Reverse/Group Mentoring Challenge	Hi {firstName}, 🚀 We're launching a [Reverse/Group] Mentoring Challenge! Participate to explore new skills, share experiences, and gain fresh insights from peers. Challenges like this are a fun way to reinvigorate your mentoring relationships and add variety to your sessions. 🌈 Engaging in these activities mid-program can help you learn in new ways and apply those insights to your regular meetings.
October	Survey / Feedback	Hi {firstName}, 📝 Your feedback is invaluable. Please complete the [Insert Survey Name] in Mentorloop—it only takes a few minutes and helps us improve the program. Sharing your experience ensures your mentoring journey is fully supported and that we continue to create value for all participants. 🙌 Your input helps us tailor resources, tips and improve on the mentoring program continuously.

Maintain Momentum: Monthly Message

Month	Focus / Theme	Bulk Message
November	Reflection & Goal Wrap-Up	Hi {firstName}, 🎯 As the year comes to a close, review your goals and celebrate progress. Log your achievements in Mentorloop and reflect on key learnings with your mentor/mentee. Recognizing small wins helps you prepare for continued growth next year. ✨ Consider what worked well and what you'd like to focus on next year to make your mentoring even more impactful.
December	Appreciation & Rematching	Hi {firstName}, 🎉 Thank you for participating in this year's mentoring program! If you'd like a new match next year, please reach out and let us know as we prepare to plan for the round! Reflect on your mentoring journey and consider what you want to focus on in the coming year. 🌟 Celebrating successes and planning ahead ensures a strong start to next year's mentoring program.

Managing your Program

Relaunching Your Program
Relaunching your mentoring program is a great opportunity to reset and provide clarity for existing participants.

Clearly communicate what's required from participants, what continuing in the program looks like, and how participants can stay engaged.

Cleaning up inactive participants
Identify participants who have been inactive or unresponsive and take appropriate action.

This may include sending reminders, offering support, or temporarily marking them as unavailable.

Maintaining accurate participant records ensures your program remains effective and your active participants receive the support they need.

Closing off the mentoring program
When your program is nearing completion, provide clear guidance on next steps.

Encourage participants to reflect on their achievements, complete any outstanding surveys, and log their final meetings.

Celebrating progress and formally closing the program helps participants recognize their growth and prepares them for future mentoring opportunities.

Managing your Program: Relaunching

Relaunching your mentoring program is a great opportunity to refresh your cohort, onboard new participants, and set clear expectations for everyone. **The steps below outline the key actions to take to ensure a smooth relaunch.** Throughout this guide, we've also included sample communications you can use to inform and engage your participants at each stage.

1. Closing Loops

Existing loops may need to be closed before you relaunch your program with new matches. This can be done easily from the Loops Tab.

See our help resource for detailed instructions.

2. Recruitment

Relaunching is the perfect time to recruit new participants! Not sure where to start? Our Program Marketing and Recruitment Guide provides everything you need, including communication templates to help you get started.

3. Removing Participants

If your program runs in cohorts, you may need to remove inactive or ineligible participants before re-matching.

You can do this directly from the Participants Tab.

See our resource for step-by-step instructions.

4. Communicate About Matching

Whether you're manually matching, encouraging self-matching, or using the Smart Match algorithm, it's helpful to update participants on what to expect and when matches will be confirmed.

Clear communication ensures participants are prepared and engaged.

5. Match Your Participants

It's time to create matches! You can find tips on making manual matches, or reach out to your Account Manager to schedule Smart Matching.

Managing your Program: Relaunching

Inform participants that you will be closing loops and rematching them! Consider giving them an opportunity to take a break from the program.

Hi,

{Program Name} and Mentorloop would like to thank you for your participation in the {Cohort/Year} {Program Name}.

We had {number of participants / number of matches / average MQS} in the mentoring program, highlighting the value this program provides.

In preparation for the next iteration of the program,we will be closing out your loops in order to facilitate another round of matching.

We recommend you log in to Mentorloop one final time to contact your mentoring partner and thank them for their time. If you plan to keep in touch, it might also be worthwhile asking for their contact details.

We hope that you have enjoyed participating in the program and we look forward to setting up your next mentoring relationship. Alternatively, If you would like to take a break please reply to this email and we can remove your account.

Thanks,

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General Relaunch Update

Hi {firstName},

We're excited to be relaunching the mentoring program! 🎉 We'll be creating new matches shortly, and we want to make sure you're ready to continue.

If you do not wish to continue, please let us know by [insert date]. Otherwise, we'll assume you'd like to stay in the program and will include you in the next round of matches.

If you want to rejoin or update your preferences, you can easily do so by reaching out to us at [email].

We're looking forward to another great round of mentoring!

Managing your Program: Relaunching

Matching Opt Out

Give participants the opportunity to opt out of matching and the program when re-launching.

Hi,

{Program Name} and Mentorloop would like to thank you for your participation in the {Cohort/Year} {Program Name}.

We had {number of participants / number of matches / average MQS} in the mentoring program, highlighting the value this program provides.

We hope that you have enjoyed participating in the program and we look forward to setting up your next mentoring relationship!

Alternatively, If you would like to take a break simply mark yourself as ['unavailable'.](#)

Thanks,

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If you're manually matching your participants, let them know when.

Hi,

It's time to meet your match!

In a couple of days we'll be matching you with someone from within your program! It may be worthwhile allowing some time in your schedule, for the first meeting.

We're hopeful this match is a life changing connection but it may also just be the first step in building out your [personal advisory board.](#)

Thanks,

💡 Tip: You can also update the **'New Match Email Notification'** with specific information, via [Program Settings.](#)

Managing your Program: Closing your Program

As your program nears completion, it's important to provide participants with clear guidance on next steps. Encourage them to reflect on their achievements, complete any outstanding surveys, and log their final meetings.

Celebrating progress and formally closing the program helps participants recognize their growth and prepares them for future mentoring opportunities.

We've outlined a few key steps to help ensure the closure process runs smoothly for everyone:

1.   **Communicate Program Closure**

Let participants know when the program will officially close so they can schedule their final meetings and download any files or messages they'd like to keep.

2.   **Export Your Program Data**

Export your program data via your Program Settings before the program is closed.

> 💡 Tip: You can also reach out to your dedicated Mentorloop Customer Success Manager if you'd like them to provide a copy of any external reports created throughout your time with Mentorloop.

3.   **Contact Mentorloop**

Contact support@mentorloop.com or your dedicated Mentorloop Customer Success Manager, as they will be able to close your program for you.

Both you and your participants will lose access to the Mentorloop platform.

Managing your Program: Closing your Program

Inform your participants that the mentoring program is coming to a close and provide them with next steps.

Hi {name},

{Organisation} and Mentorloop would like to thank you for your participation in the {Mentoring Program Name}. It was fantastic to see over {No. of participants}mentors and mentees take part. This program is coming to a close on {Date}

What is Next?

We recommend you log in to Mentorloop at least one more time to contact your mentoring partner and thank them for their time.

We highly encourage you to continue an informal mentoring relationship outside of this program if that is right for you. Make sure you have a conversation to see if this is something you are both interested in and, if so, exchange contact details.

If you would like to save the conversations you've had, the content of your loop can be exported, you simply need to log into Mentorloop and click here - https://app.mentorloop.com/export-loops-data.

Please note that files shared within your loop need to be exported separately. We hope that you have enjoyed participating in the program.

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Reminder: Program Closing Soon

Hi {firstName},

Just a quick reminder that our mentoring program will officially close on {date}.

Before then, we encourage you to:
✅ *Have your final meeting with your mentor/mentee*
✅ *Complete any feedback surveys*
✅ *Download any files or messages you'd like to keep*

We've loved having you as part of this program and can't wait to see how you continue to grow beyond it!

Best,

Managing your Program: Inactive participants

Identify participants who have been **inactive or unresponsive and take appropriate action**. This may include sending reminders, offering support, or temporarily marking them as unavailable.

Maintaining accurate participant records ensures your program runs smoothly and that active participants continue to receive the support they need.

How to Identify Inactive Participants

Similar to monitoring loop activity, you can identify inactive individual participants in two ways:

1. **Participants Page – Last Activity Filter**
   Go to your Participants Page and filter by Last Activity. This will generate a list of participants who haven't interacted within a selected timeframe.

2. **Sentiment Page – Low Engagement Feedback**
   Navigate to the Sentiment Page and filter for low star ratings or review comments related to engagement. This helps identify participants who may not be actively participating in their mentoring match.

💡 Tip: For Enterprise programs, Mentorloop offers integrations to make managing participants easier. You can learn more about deprovisioning users.

Managing your Program: Inactive participants

Gentle Reminder: Staying Active in the Program

Hi {firstName},

We noticed there hasn't been much recent activity in your mentoring loop. We understand life gets busy — but we'd love to see you continue making the most of your mentoring relationship!

If you're still keen to participate, **we encourage you to check in with your mentor/mentee and schedule your next meeting**. If you're no longer available to continue, please mark yourself as **unavailable** via your Profile Settings so we can keep our records up to date.

Thank you for being part of the program! 🌱

Warm regards,

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Friendly Check-In

Hi {firstName},

We've noticed it's been a while since your last interaction with your mentoring match. 💬 Even a quick catch-up can make a big difference in your mentoring experience!

If there's anything holding you back, or if you need support, please reach out — we're here to help.

Best regards,

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Encourage Engagement

Hi {firstName},

It looks like you haven't had a chance to connect with your mentor/mentee recently. We recommend scheduling a short meeting or sending a message to keep the momentum going. ⏳

If your availability has changed, you can temporarily mark yourself as unavailable in your profile settings so we know you're taking a break.

Thanks,

Managing your Program: Inactive participants

Reminder About Program Participation & Inactive Status

Hi {firstName},

It seems you haven't been active in the program recently. To keep the mentoring experience meaningful for all participants, we ask that you either engage with your match or mark yourself as unavailable via your profile settings by [insert date].

If we don't hear from you, we may remove you from the program to open up space for participants who are actively looking for mentoring opportunities.

Thank you for helping us maintain an effective program!

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Final Notice Before Removal (with Rejoin Option)

Hi {firstName},

We've noticed continued inactivity in your mentoring participation. To ensure active participants receive the support they need, we will be removing inactive participants from the program if no updates are received by [insert date].

If you'd like to stay in the program, please update your availability in your profile settings or reach out to us directly.

*If you're removed, don't worry — you can **easily rejoin the program at any time by logging in and selecting "Rejoin Program".** This ensures you can continue your mentoring journey whenever it suits you.*

Thank you for helping us keep the program active and effective!

💡 **Enable Rejoin Functionality**

When removing participants, enable the rejoin option. This allows participants who wish to return to the program to easily add themselves back in, keeping your program flexible and participant-friendly.

Summary

In this playbook, we've provided guidance on key areas to help you effectively manage and communicate with your mentoring participants — from re-launching your program to celebrating milestones, tracking sentiments, and closing your program.

We hope this guide has given you clarity and confidence to engage participants, maintain momentum, and ensure your program runs smoothly.

Included in this playbook are **communication templates designed to support you at different stages of your mentoring program:**

- [Mentorloop Milestones](#)
- [Maintaining Momentum](#)
- [Managing your Program](#)

These resources are intended to make it easier for you to keep participants engaged, provide timely support, and run a successful mentoring program.

Need More Help?

💬 Contact your Customer Success Manager, or

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

mentorloop.com