

Getting Started:

# Matching Types and Techniques



Mentorloop

# Introduction

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Hi there! 🙌

If you're reading this, you've probably already determined your **matching criteria** and are now needing to determine what matching type or technique will work best for your program. Fantastic!

So in this guide, we'll dive right into the different types of matching, how you can use them on Mentorloop, and how you can mix and match them depending on your program's needs.

Once you've completed this step, you're officially on your way to managing your best mentoring program ever through the Mentorloop flywheel:

**Match → Momentum → Measure**

So let's get to it!



# Contents

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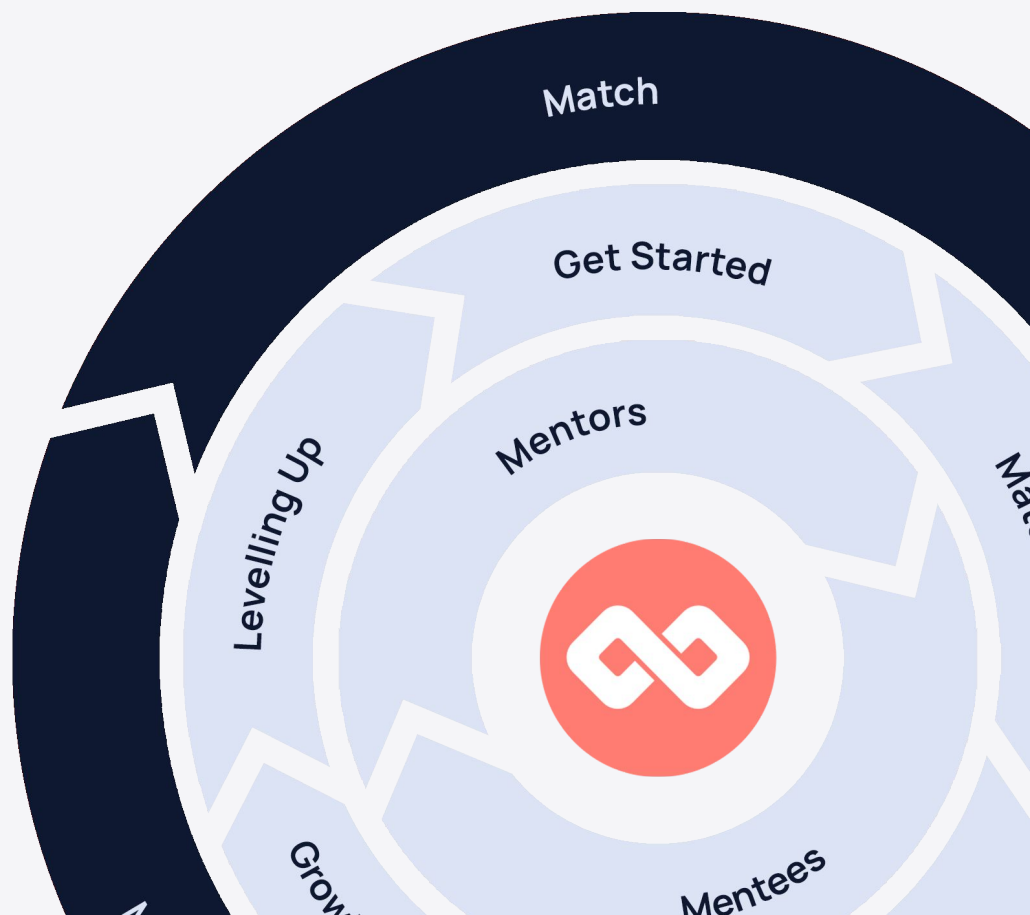
## Getting Started:

The Mentorloop Matching Guide and Cheat Sheet

## Matching Types

- Manual Match
- Smart Match
- Self Match

## Matching Techniques



# Matching Types

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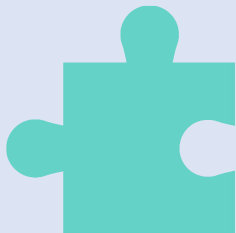


There are three main matching types you can use on Mentorloop:



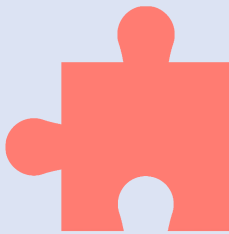
## Manual Match

Matches made by the Program Coordinator



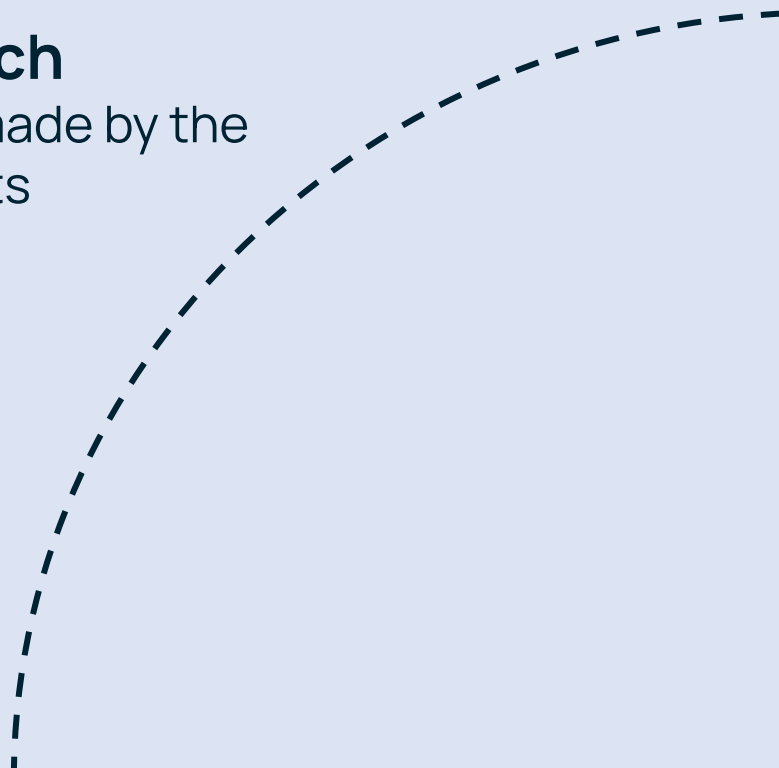
## Smart Match

Matches made using the Mentorloop algorithm



## Self Match

Matches made by the participants



# Manual Match

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**A manual match is done by manually reviewing participant profiles to see where there might be some similarities or overlap of interests or areas that mentees would like to develop.**

You then introduce the pair and possibly share why you found them to be a good mentoring match.

**This gives you full control over the matching process.**

Manually matching your participants is a good option if you have intimate knowledge of the people involved in your program.

This could also work well if you are running a highly curated program, one for 'high potentials', or smaller targeted programs.

**Pro Tip:** For larger programs, you can use Manual Matching to match a few participants before using a more scalable matching type for the rest of your cohort.

For example, if you have high profile participants in your program, this might be a matching technique to use to pair those participants up before Self/Smart Matching the rest of the cohort.



# Self Match

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**Using Self Match empowers your participants to choose their mentoring partners themselves.**

Participants can search the platform for a mentoring partner based on anything that appears on their profile - this could be skills, location, by role, industry, or even the information in their more detailed bio.

They can filter down until they find their desired match, then reach out to connect. The recipient then has the opportunity to review, then accept or politely decline.

**We recommend turning 'Recommended Matches' on when using this matching type.**

We'll talk more about 'Recommended Matches' later on.

# Smart Match

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**Smart Matching is when Mentorloop runs the algorithm to match your entire cohort based on your chosen criteria.**

Using Smart Match is great for large programs, as well as for removing unconscious bias (both from the program coordinator and the participants) from the matching process.

**When you use Smart Match, Mentorloop provides you with a whole set of recommended pairings or 'Draft Loops' which you can review, then approve or reject.**

# Recommended Matches

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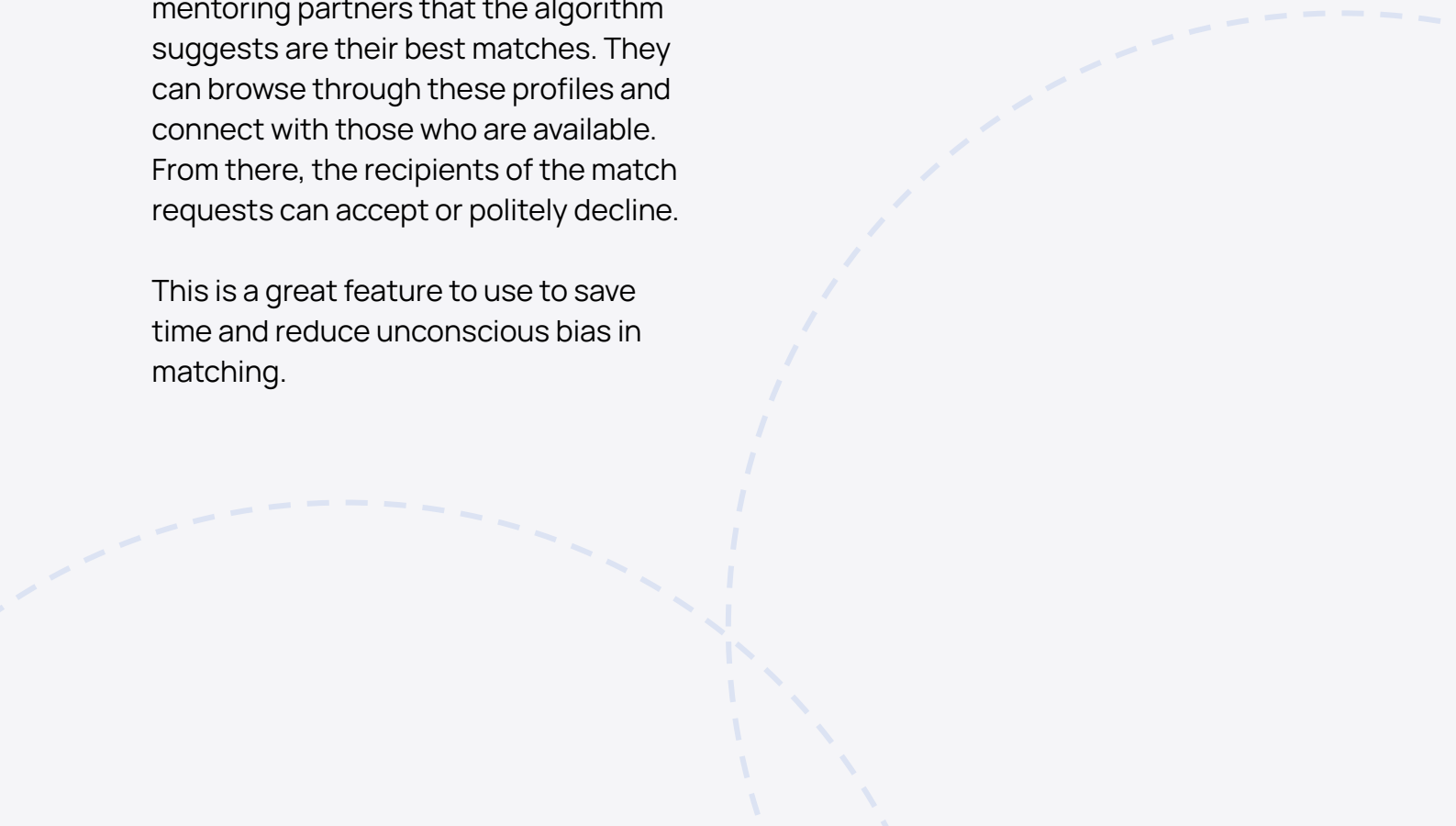
**Recommended Matches are suggested connections that the Mentorloop algorithm has identified as great matches.**

You can turn this feature ON or OFF depending on how you want to run your program.

When you turn 'Recommended Matches' on, the Mentorloop algorithm delivers a shortlist of recommended pairings based on information provided by the participants when they signed up such as similarities in skills and goals.

Participants will receive a number of mentoring partners that the algorithm suggests are their best matches. They can browse through these profiles and connect with those who are available. From there, the recipients of the match requests can accept or politely decline.

This is a great feature to use to save time and reduce unconscious bias in matching.

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# Matching Techniques

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**Mentorloop's matching types are buildable, and Mentorloop customers usually use a blended matching technique.**

This means you can support a primary matching type with a secondary one to ensure that your participants are all given great mentoring matches.

In this part, we'll give you a few suggested ways of using certain matching techniques.

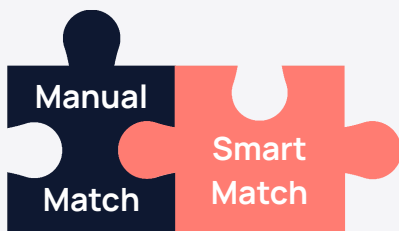


# Matching Techniques

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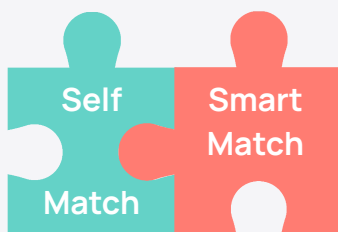


You can use this technique to empower your participants to find their own matches, then manually match the ones who need a helping hand.



Use Smart Match to pair up your entire cohort, then manually match people later on if there are pairings that don't work out.

You can also use this to manually match popular participants who may get too many requests, then run Smart Match to pair up the rest of your cohort.



For programs that are always on, you can use this technique to match your initial applicants with Smart Match, then allow the ones who join later to search for and request a match with mentoring partners by themselves.

# Summary

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We hope this guide has helped you determine which matching types and technique will suit your mentoring program best.

If you have any questions or would like to speak to a Mentorloop representative about launching your own program, you can speak to one of our mentoring experts!

[Contact Us](#)