



MENTORING PLATFORM

Quick User Guide

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Introduction

This Quick User Guide will help you get the most out of your Mentoring experience, by helping you navigate your way through the mentoring platform.

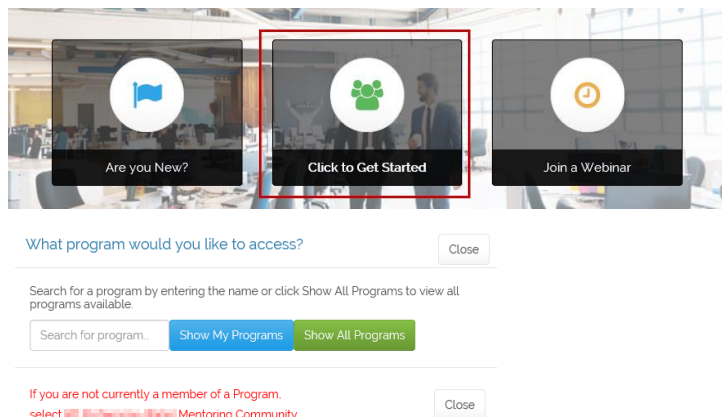
How the Platform Works

The mentoring platform houses a combination of numerous mentoring programs. The Community (Enterprise Wide) Mentoring Program provides access to all participants within the mentoring platform. The other programs are typically created to achieve specific organizational objectives. Participants can request to join these programs. Each program has a different profile and access to different resources.

How to Access Programs

There are two ways to access Mentoring Programs:

- 1) **Mentoring Platform Welcome page** - select the middle icon 'Click to Get Started', and a popup will appear. Search for a program by either typing in the name and selecting it from the options below or select the 'Show My Programs' or 'Show All Programs' for a list of the programs.



- 2) **Program Welcome/Home page** - select 'View other Programs' from the top navigation toolbar and a popup will appear. Search for a program by either typing in the name and selecting it from the options below or select the 'Show My Programs' or 'Show All Programs' for a list of the programs.



What program would you like to access? Close

Search for a program by entering the name or click Show All Programs to view all programs available.

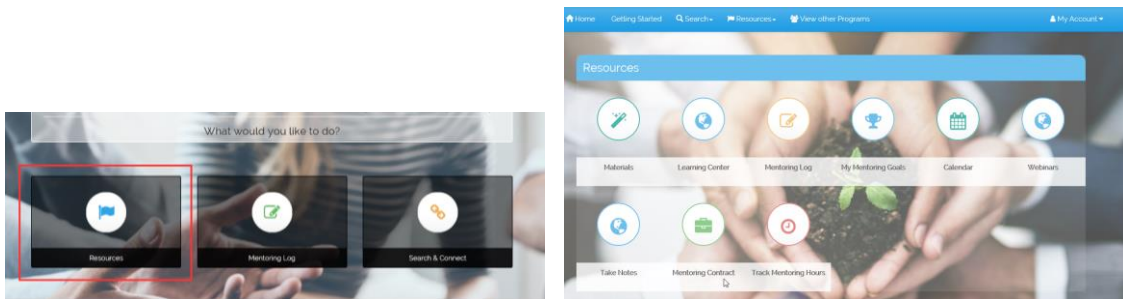
Search for program... Show My Programs Show All Programs

If you are not currently a member of a Program, select Mentoring Community Close

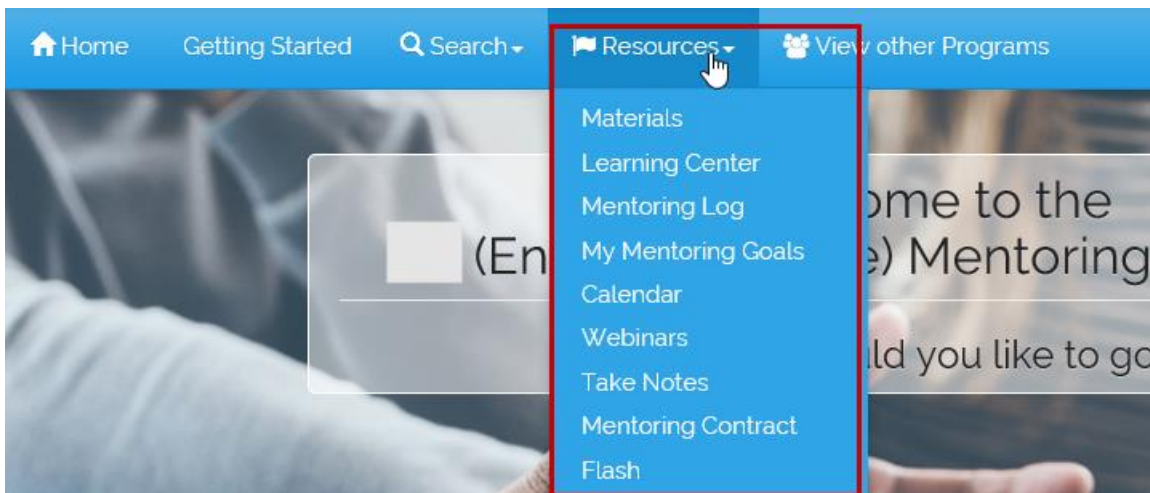
How to Access Resources

All Resources, such as the Mentoring Materials, Mentoring Log, Goals and Calendars, can be found on the **Resources** page. There are two ways to access the Program Resources:

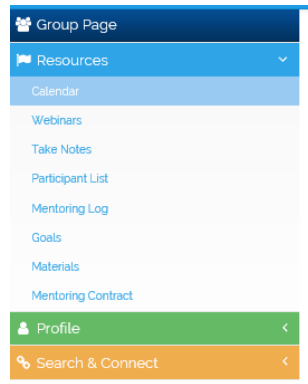
- 1) From the Program Welcome/Home page select the **Resources** icon. The **Resources** page has the icons for each resource that is available for that specific program.



- 2) Select **Resources** from the top navigation toolbar and a drop-down list is available.



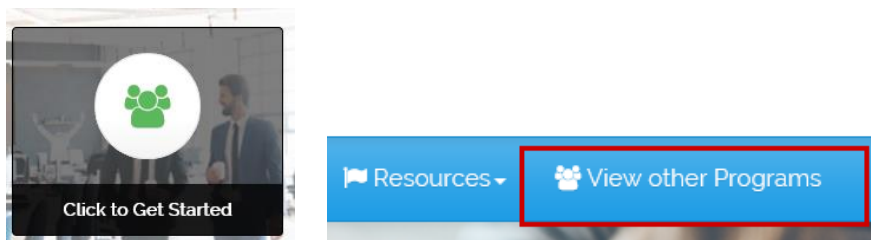
- 3) Select **Resources** from the side menu within the pages, to navigate to specific resources.



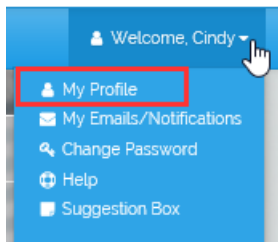
How to Access the Profile

Program profiles can vary from program to program. It is therefore essential that the program is accessed prior to updating or viewing the profile.

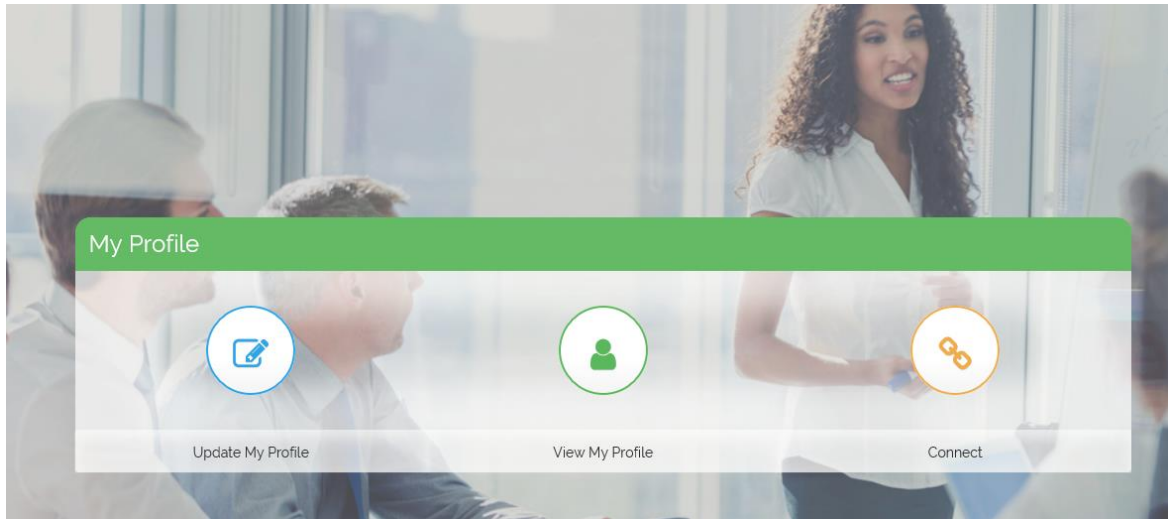
- 1) Access the Program – either from the **Click to Get Started** icon or **View other Programs** on the top navigation toolbar.



- 2) Select **My Profile** from the **Welcome** option on the top navigation toolbar.



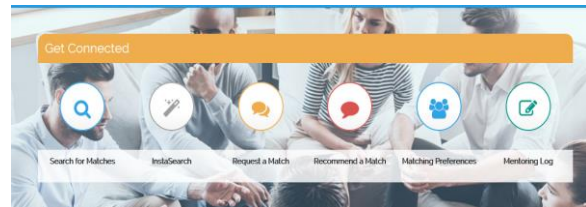
- 3) From the **My Profile** page participants can update or view the profile.



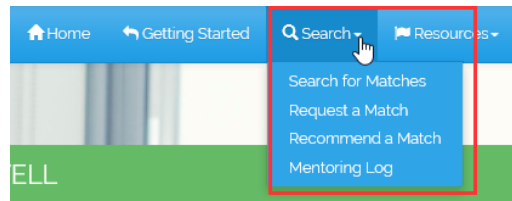
How to Search & Connect

Connecting with a mentoring partner is the purpose of this program. We have therefore made it easy to connect by offering different ways to get connected and access to the functionality in various places.

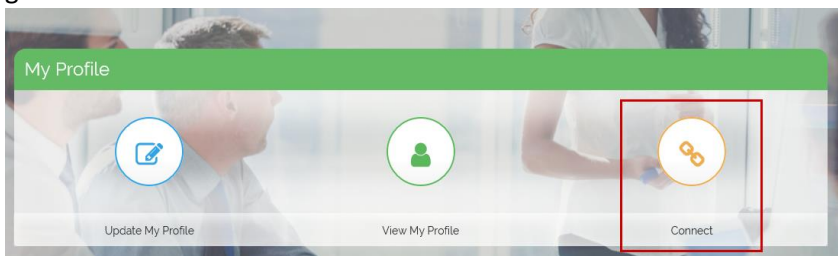
- 1) From the Program Welcome/Home page select the **Search & Connect** icon. The **Connect** page has various ways to get connected.



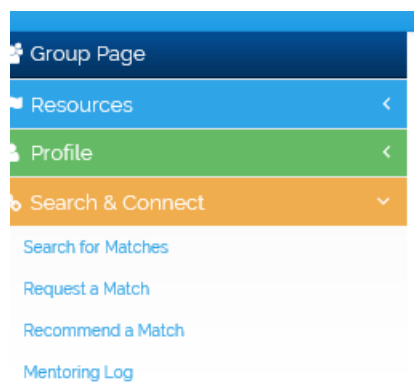
- 2) Select **Search** from the top navigation toolbar. The drop down lists options for searching and connecting.



- 3) Select **Connect** from the **My Profile** page, this directs to the Connect page with various ways to get connected.

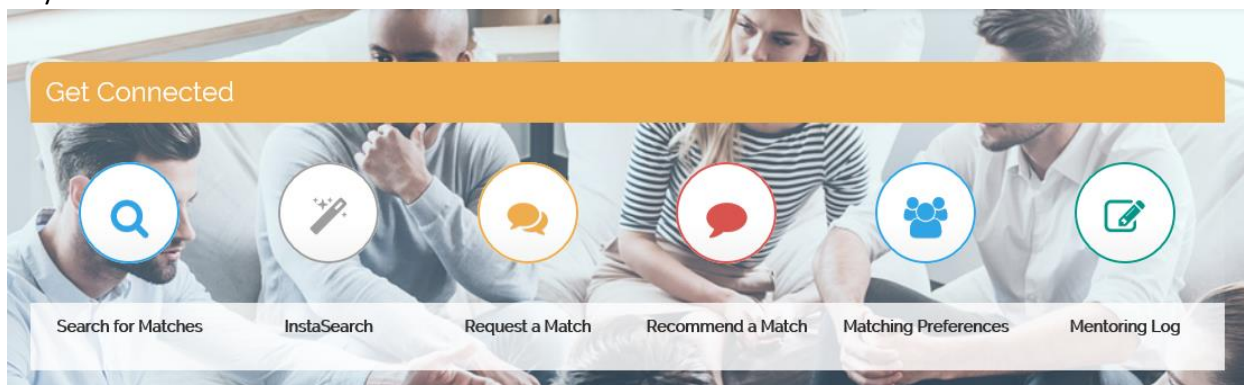


- 4) Select **Search & Connect** from the side menu, within the pages, to navigate to specific Search & Connect options.



Ways to Get Connected

Programs offer a variety of ways to get connected. Below is a description of the two most common ways to Search and Connect with a Mentor or Mentee.



Search for Matches

Most items listed on a profile can also be used to Search for a Mentor or Mentee.

1. Choose a Mentor or Mentee.
2. Enter search criteria by entering text, selecting options from the drop downs or checking the boxes.
3. Select Search at the bottom.

4. The Search results will look like this

Search Results For Community

Search Results

1. **View Details** – click on the link to open more information about the search and to **Request a Match**.

2. **Participants name** – click on the participants name to view their profile and learn more about them.
3. **Compare Profiles / Request a Match**
 - a. Compare Profiles - is a side by side comparison of your profile and the potential match.
 - b. Request a Match – click on the button to request a connection.
4. **Revise Search Criteria / New Search** – change the search criteria or start the search again.

Search Results For Community

The screenshot shows the 'Search Results For Community' page. At the top right, there are two buttons: 'Revise Search Criteria' (orange) and 'New Search' (green), with a callout '4' pointing to them. Below the header, there are four search result cards. The first card on the left has a callout '2' pointing to the participant's name 'Lerley Williams'. Below the name is a table titled 'Matched Criteria' with columns 'Searching For' and 'Mentor'. The table shows 'Job Level' as 'Team Leader/Supervisor'. At the bottom of this card are two buttons: 'Compare Profiles' (green) and 'Request a Match' (orange), with a callout '3' pointing to them. The second card on the right has a callout '1' pointing to the participant's name 'Michaela Roberts'. The third and fourth cards are partially visible at the bottom.

Tips for Search Results

If the search is generating a limited amount of results or none, consider limiting the search criteria to 2 or 3 key elements. Still no hits? Consider reaching out to someone else within that department and/or location and ask if they know of someone who might be available to mentor.

Request a Match

Request a Match is used when the name of the person is already known.

1. Select which role the search is for a 'Mentor' or 'Mentee'
2. Type the person's last name in the drop down, this will provide a list to choose from
3. Pick the duration of the mentoring relationship
4. Enter text to let the person know the reason for the request, this will be part of the email communication that is sent out
5. Select **Request a Match**

Request a Match

The form is titled 'Request a Match'. It contains a label 'Request a Match with a' followed by a dropdown menu. The dropdown menu has two options: 'Mentor' (selected) and 'Mentee'.

Request a Match

I am requesting a match...

☐ To mentor this person

☒ To be mentored by this person (to be their Mentee)

(Names will appear when you start typing in this box. Search by last name)

I would like to work together in this mentoring relationship for Pick One

(This duration can be changed or terminated at any time in your My Log section)

Why are you interested in connecting with this person?
(this will be emailed to them - minimum of 25 characters)

Request a Match

Recommend a Match

Using **Recommend a Match** is a perfect way to introduce two people who would work well together or use it to create a buddy match for a new or transitioning employee.

1. Select the Mentor's name from the first drop down, type the last name to move the list down quickly
2. Next select the Mentee's name.
3. Pickup how long for the mentoring relationship from the drop down – OPTIONAL
4. Duration is Suggested or Required.
5. Progression emails – sends both participants emails throughout the mentoring relationship to remind and guidance them through the experience.
6. Why text box – a brief description of why they should connect, this will be included in the email to the participants.

Recommend A Mentoring Match

Recommended Mentor--Select--

Recommended Mentee--Select--

Optional:

I would like to work together in this mentoring relationship for Pick One

This duration is ☐ Suggested ☐ Required

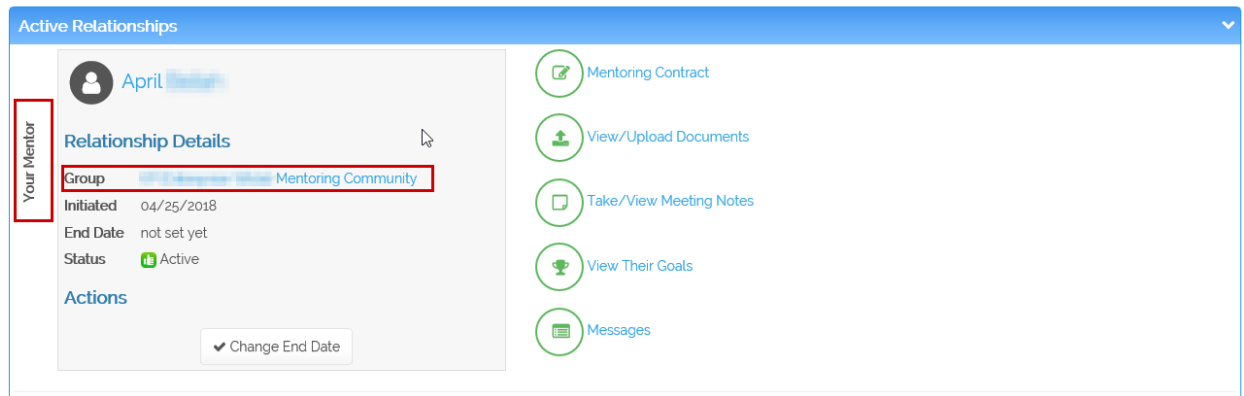
☒ Send these individuals [progression emails](#) with this relationship

Why are you interested in connecting these two people? (this note will be sent to them in the email)

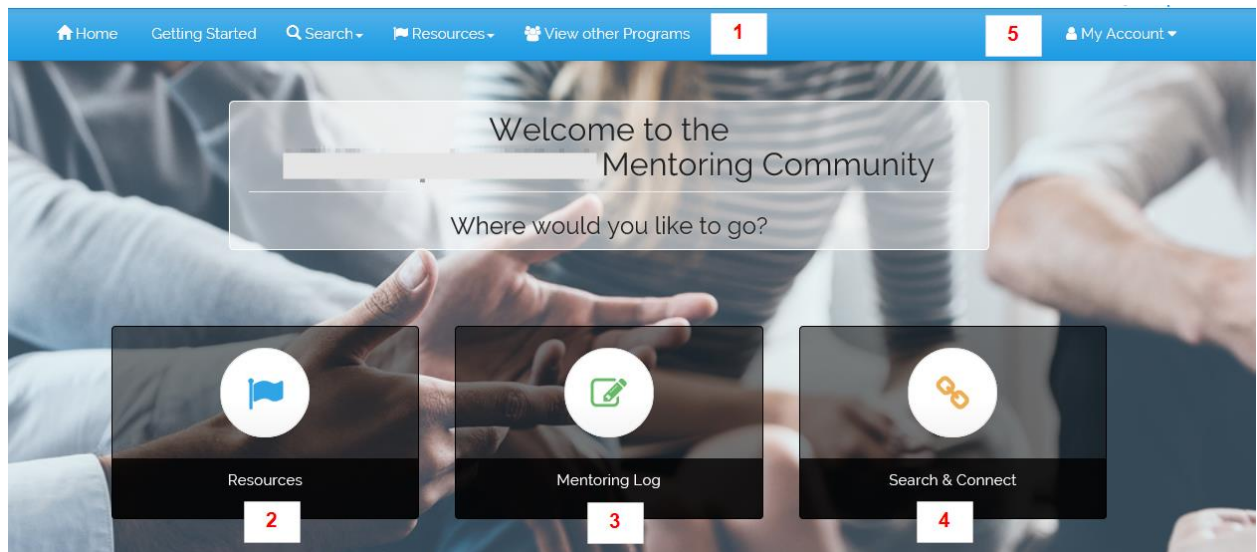
Recommend a Mentoring Match

Managing Mentoring Relationship

The Mentoring Log is the place to manage all mentoring relationships for all programs. The mentoring partners role is indicated on the left-hand side of the name. Mentoring relationships can be confirmed, declined and ended (if permitted) in the Log. In addition to other mentoring relationship functions, such as, sending Messages, completing a Mentoring Contract, taking Notes and establishing Goals.



Navigating the Platform



1. Top Navigation Toolbar

- a. **Home** – goes back to the Program Welcome/Home page, as seen above.
 - b. **Getting Started** – steps to be taken to get involved in the programs mentoring program.
 - c. **Search** – drop down list of Search options.
 - d. **Resources** – drop down list of all Resources for that program.
 - e. **View other Programs** – the popup gives access to navigate to another program.
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2. **Resources** - directs to the resource options for that program.
 3. **Mentoring Log** – used to manage all mentoring relationships.
 4. **Search & Connect** – directs to the search and connect options.
 5. **Welcome** – access to the Profile, Email Notifications and other account information (e.g. Admin Dashboard for admins).