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**Brent Jensen:** Thank you everybody for joining us today. I'm incredibly excited for what the next hour has in store for us. Today we're going to be hearing from the panel of experts we have in front of us. In between the three of them, they have one or run literally hundreds of mentoring programs. Just a quick run through of how this is going to go. We're going to start off with introductions, some few housekeeping rules and then we're going to dive into the panel questions, six questions running from starting mentorship programs all the way to the end in scaling and measuring and making the business case for a mentorship program. So start the finish. We've got everything covered. We're going to try to allocate about 45 minutes for that, followed up by 15 minutes of Q and A from the audience. So if you do have questions we will get answers for them as well too. First and foremost, I'd like to introduce myself. My name is Brent. I work here at together, and I'll be the host and moderator for today asking the questions to our panelists. The first of which is our very own Jai Chagger. He's the director of Customer Success and works with and advises our customers at together. Jai's notably helped customers like Disney, Airbnb, and the UN and starting scaling their programs, as well as helping clients move from a manual approach all the way over to a software driven approach. We are also joined by our two experts, Jodi and Daniel. Jodi has over 20 years of experience working in corporate environments with five years running mentorship programs at a Fortune 50 healthcare company. Before going on to start Mentor Strat, a mentor consultancy firm, building the strategy and roadmaps for corporate mentoring programs. Dan joins us with another 20 years of experience creating mentoring programs for corporations as well as social enterprises and nonprofits. Dan's focus has been on increasing access to growth opportunities, which has led him to work on programs that develop talent, build community, and ultimately increased equity through his Company CoLabL. Dan, Jodi, thanks so much for joining us today.

**Jodi Petersen:** Thanks for having us.

**Brent Jensen:** Amazing. So, just one bit of housekeeping tools. There is a Q and A feature enabled for this webinar. If you have questions during the presentation and the panel, please make sure to put them into the Q and A and not the chat feature. This way we'll be able to keep track of them and make sure that we do get an answer for them either today or in future events as well too. And just an FYI, the icon has the two bubbles, not the one, Zoom seems to make that not very indistinguishable from one another. So without further ado, let's begin. So want to start off the panel with just a quick feel good question. So over all the programs that all of you have worked on, what stands out as one of your favorite or most memorable success stories from a mentoring program?

**Jai Chaggar:** I'm happy to kick this one off. I think one personal, one that's near and dear to me is actually what brought me to together. A funny story, I ended up reaching out to a mentor for a mentorship chat and got drawn to working for a mentorship company. But to be honest, I think it is hard to pinpoint one. But overall, I think it's just the overwhelmingly positive impact you see from our administrators or their ‘aha moment’ when they officially launch their program. It's the moment where the program becomes really hands off and the true beauty of mentorship starts to unfold, and you start to allow people to make meaningful connections, unique experiences that otherwise wouldn't have been possible without the program that they've launched. And then, I think the true heartfelt thing at the end is seeing all the feedback that's shared by the users that our admins are, you know, give us some privy to and just the impact that the sessions have, that's truly special to see. So I know it's a bit of a cop out, but it truly is that ‘aha moment’ and seeing the success stories that we get to be involved with.

**Daniel Horgan:** I can jump in.

**Jodi Petersen:** Ok, go ahead.

**Daniel Horgan:** I was just going to share a quick one that's more recent. So we do a lot of work with the Taco Bell Foundation, Taco Bell Corporate, and there's a young leader who's a scholarship recipient of the Live Mass Scholarship Program. He's also an employee of Taco Bell, and he was part of our mentoring program, and we matched him with the ERG leader for the LGBTQ network. This young leader was really interested in really trying to understand how he can navigate the corporate workplace as an individual who identifies as part of the LGBTQ plus community, and him and his mentor just hit it off just were able to really dive deep into understanding the job application process, figuring out what type of leader is going to create a really inclusive environment for him to grow in. And throughout their mentorship experience, he applied for one role that he didn't end up getting and was able to bounce back really quickly, applied for a different role and was hired on. And so he just started a few weeks ago. And it's so cool to just see this young leader have that support system outside of his immediate team and understanding kind of the power of that web is support when you look at a corporate environment, especially for early career talent.

**Jodi Petersen:** Okay. That's awesome, Dan. I want to just talk a little bit about, I think my own story. I have tons of these good mentoring vibe stories but my own crease stories are really good example of the power of mentoring. So before mentoring I became, in this industry I had a 20 year career in software strategy planning. So about seven years ago you guys might resonate, this might resonate with you. I applied for a role on my own team. I wrote the job description for my leader. I was a hundred percent qualified for the job, and I didn't get it. And the reason that I didn't get the job is because my leader told me that I didn't have enough exposure in the company. I didn't have enough capital built up in the company to be an influencer in the way that would be needed for success in this role. So in order to increase my exposure, I signed up to be a volunteer in our women's ERG. I was asked to help automate the matching process for our mentoring program because of my technology background. This was before all the togethers of the world. Now they do that way better than I did. But I signed up for mentoring myself, and I became very passionate about it because I started to see all of the different connections were being made and how those could expand just your overall knowledge of the organization, your exposure in the organization that you're working in. So about two years into running the women's program, I started, I became asked by the other ERGs, you know, hey, can you help us start a program? We want a program. It was then that I realized that we didn't really want to replicate one program in many spaces. We wanted to understand the needs of those ERG members in those certain populations and design programs to meet their needs. And so I created a business case for the organization to create an enterprise mentoring program, not thinking that it would be me that would be taking charge of the whole thing and leading the effort. But I did that and then I, once they accepted the proposal, they asked me to apply for the program to lead the program. But I had to work with my mentor on really all of those intentional steps that it would take to pivot your career from one area to another. A lot of times when you want to reinvent yourself, you have to leave your organization. But this working with a mentor allowed me to stay in the organization that I cared so much about and make that pivot to further fulfill my own career.

**Brent Jensen:** Amazing. All wonderful examples of just what mentorship does at the end of the day. With that in mind, I do want to pivot towards something that is a little bit more practical, especially when planning a program. So when you're starting a program for the first time within an organization, there's a lot to consider about how the program will be structured and who the program's going to be for. So, Dan, maybe you can speak to this question a little bit, but what is the best starting point or approach to the siding on how that program is going to be structured?

**Daniel Horgan:** Yeah, absolutely. I would say start with two things. I'm going to build off a little bit of what Jodi you just shared here. So the first is, I think you have to start with what the ultimate program goals are. And to get to that, I think sometimes the things that you look more closely at are the organizational priorities. What are the top things that the business is trying to achieve, or the organization or the association? And two, I think looking at existing data, I think a lot of times when we go to develop mentoring programs, we can make a lot of assumptions, and being mindful of making database decisions is going to guide you in the right direction and ensure you're sort of creating a strong foundation for the mentorship program design. The second is really understanding your target audiences. You know, again, at some point you kind of have to brainstorm who are all the audiences that could be involved in this program? And now as you start to prioritize and filter it down to the ones that you want to engage, you really have to ask yourself, what do I already know about this audience? Based on the data that we've collected, the conversations that we've engaged in, that anecdotal information that people have shared, whether it's through an employee survey or through some other, again, focus group. The second part of that though, is acknowledging that what you don't know. And so co-creating mentoring programs with your target audience would be one of my top pieces of advice for everybody here. Even if you're at the early stage of developing a pilot program, narrow down your target audience, align with program overall organizational objectives, and co-create it together. We do design labs with target audiences for mentoring programs and the buy-in that you established through that process already help set your program up for success before you even launch the orientation for it.

**Brent Jensen:** Amazing. Jodi, anything to build off of that?

**Jodi Petersen:** Yeah, I think just a couple things. I love the design lab concept. Dan. I think that's really amazing. And I'm in agreement a hundred percent with everything he said. I would say if you're thinking about a large enterprise, you may run into a situation where an umbrella program, a modern mentoring umbrella program, you may need to look beyond the traditional one-on-one, kind of level ahead mentoring, understanding, as Dan said, the employee needs. And if you are an organization that has a defined employee journey from hire to retire, each stage of those journeys will have different developmental needs. And it's important to, you may end up with a host of smaller or a series of smaller programs versus one giant program to meet the needs of those individuals. So really taking that time to understand what the desired future state is. And I would say the other tip would also be to really understand the current state. Even if you don't have a formal mentoring program, there's something going on in your organization. So really trying to find out where those pockets of mentoring are happening, then it's going to help you not only leverage the good activities that are taking place and build upon those, but you're going to find out who your mentoring champions are, and those are a must have for developing your successful programs.

**Brent Jensen:** Amazing. Jai, any final thoughts?

**Jai Chaggar:** Yeah, just echoing a bit of what Jodi and Dan said some fantastic points, but I think there's also the three main buckets to focus on, you know, as outlined, your goal identification, so just having a clear understanding of which organizational problem you're trying to solve for. So for example, you're trying to onboard new hires faster, or you're trying to create opportunities for certain groups or departments or simply just connect individuals across your organization. I think when you have the purpose of your program set, everything else becomes easy. And at together, we actually have different program formats to help you achieve your goals. So a key decision we get our administrators to make is, do you want your program to be always on, or what we call evergreen, or do you want it to be more time bound or what we call a cohort program. So, an intern program is likely only going to last 2, 3, 4 months. That's more time-bound. We're going to lean more into that cohort structure or for something like skill development, that's long and everlasting career journey, that's going to be more evergreen and sort of open-ended. And then secondly, as well Jodi and Dan mentioned structure, work backwards from your end goal to define what you want the structure of your program to look like. Do you want it to be group program, a one-on-one program? And then lastly going again, just the importance of pilot programs. You want to test your program with a small group and then take those learnings that you've picked up and use that to improve your program, gain confidence as you launch to a larger scale across your organization.

**Brent Jensen:** Amazing. Again, all great answers. So speaking about the program, sorry, the structure of the program, the structure is ultimately meant to match people together. And as a lot of people think the effort ends once the match has begun, but that's often not the case. There's a lot of activities that need to be done to ensure that these matches have the proper resources and have the proper support in order to actually deliver that end outcome for that goal. So, Jodi, with that in mind what are some of the activities that program managers can do during the matching to actually make sure that the impact is seen and had for the mentee?

**Jodi Petersen:** Sure. During the matching if the, some programs obviously are self-matched. So if that's the case, really putting that effort in at the front of the relationship and trying to understand or at the front of the, in the design and really trying to understand how matches will be made with that algorithm is important. But if you are, administrators are making those matches I think it goes back to what are the objectives of your program and what does that overall design look like? So let's say Jai alluded to a skills-based program. If there's a skill based program, then you're going to need to match people up, the people that have those skills with people that are developing those skills. If the intent of your program is a diversity based program, then you're going to need to use those criteria and the objectives of your program in order to make robust matching. I would also say leverage as much as you can. The people who are participating gather information from them in the enrollment process and then use that, even if you don't use it in your initial matches it can be valuable information that you can then use to improve your matching logic or approach as you're moving forward in your program.

**Brent Jensen:** Amazing. Jai, any builds on that for what program admins can do during the matching process to make sure the matches are impactful?

**Jai Chaggar:** Yeah, I think a couple, two key things. One is sort of session agendas. So I think as your match is sort of improving, you want to ensure that you're providing them with structure and guidelines for each mentoring session that allow pairings to facilitate focused discussions and ensure that their conversations are aligned with program goals. At together, actually we have predefined or best in class agenda templates that admins can build off of, but we've done a lot of extensive product research and research with our users where we actually realized it's important to empower the mentees and mentors as they're continuing their match in pairing. So our agenda templates actually allow for users to edit and customize each agenda session. So they can highlight key themes, talking points or issues that they want to highlight with their counterpart. And this really just allows users to guide their sessions as their relationship grows with their existing pairing and really take it how they see fit to improve that match that's been established. And then secondly, this more so takes it to the beginning of the match though, is mentoring agreements. You want to be able to set the expectations and rules of engagement for a mentoring relationship. A mentoring agreement should include what are the mentee's goals, expectations, the schedule of the meeting, frequency, communication preferences, but most importantly confidentiality. I think the key to a good mentoring relationship is being vulnerable and that's going to be open to setting up a lot of good key conversations. And both mentees and mentors need to feel comfortable and safe and together does a great job of providing mentoring agreements for each pairing to ensure that that matches successful and one of high quality from the get go.

**Brent Jensen:** Amazing. Dan, any builds on that?

**Daniel Horgan:** Yeah, a couple things I would just share. One is I do think it's super important to prioritize in the matching process, the goals of the individual participants. So really making sure in your, whatever your application process is, the profiles that people are building out in whatever system they might be using, making sure that it's super clear what goals they're ultimately trying to achieve in a measurable way. The second is, I think it's important to ask people what are the qualities that they're looking for in a mentor. And oftentimes people may say things like, I'm looking for somebody who has similar characteristics to me or has experienced similar life experiences. In other cases, individuals might be looking for somebody who's the opposite of them. So they want somebody who's going to serve as a mentor, who's very direct and giving them feedback and giving them advice along the journey. The last part is, I think, in the matching. So before you even dive into the actual program and relationship building process is sharing context. I think context building is so important. So when you're introducing people in the match, steer away from just saying like, Jodi meet Dan, Dan meet Jodi. Have fun on your mentorship roadmap right? Like, really share some context. This is Jodi, this is Jodi's goal for the program. This is where Jodi has been, this is where Jodi wants to go and this is what Jodi's looking to get out of this experience and the relationship with you. And then vice versa, again, helps set people up for success. The last thing I would just say, in terms of like, once the match is made, I think there's sort of four critical elements to, again, continual success. One is that you've got to make sure that that roadmap is in place so people know what to do after that initial introduction. Two, I think you've got to make sure that there are resources that people can plug and play as they need. So that roadmap might not make the most sense for every single match, but knowing that they've got a resource bank that they can pull from to integrate conversation starters, to integrate planning templates, whatever it is that they're trying to achieve in their conversations, that resource bank is critical. The third is coaching. So acknowledging that, again, sometimes you just don't know what you don't know. And so the coaching piece is something we layer into most of our mentoring programs. So beyond that one-on-one match or that group-based match, large group coaching sessions with all the mentors and mentees combined, gives us an opportunity to elevate effective practices, troubleshoot challenges, and share again additional tools that people can leverage and lean on. And then last is one-on-one support. I think one thing that I see as a challenge for some mentoring programs is that we want to automate everything and we want to make it super turnkey, but I'm a huge proponent of the fact that people feel most compelled knowing that they've got a person, a human, on the other side of the line that they can reach out to and ask for advice if things aren't going the way they planned in their mentoring relationship. So that one-on-one support system, although could be time consuming to some, depending on the size of your program, knowing that it's a human versus just an automated system of answers I think does make a big difference in the quality of the experience.

**Brent Jensen:** Amazing. Awesome. We're a little bit ahead of schedule. Any final thoughts on that from anyone here?

**Jodi Petersen:** Yeah, can I just build on one thing? I think I love the coaching aspect and I think leveraging mentor communities is a big thing. So leverage the people that are in there to help, especially for program administrators. For large companies, it can be a big job. And so as much as you can leverage the people around you, and I would say when we're thinking about mentoring sessions being high quality, you don't want to wait as an administrator. You don't want to wait until you have a big problem to know about it, right? And so it's important to keep a pulse on how relationships are going and it's at more frequent intervals than just the end of the program or the end of the cycle survey. So if you can implement checkpoints throughout, whether it's through pulse surveys or check-ins that can help you identify when there is an issue, but you're also going to want to make sure that you've got a way to handle those issues, right? You have a documented process for dealing with any issues that arise and that you're not kind of left in this, you know, it can be very emotional for people, right? These are their careers and their relationships. And so you want to make sure that you have that plan in place before you approach a pair that where maybe their relationship isn't going as well.

**Brent Jensen:** Amazing. Awesome. Again, wonderful answers. Something that was brought up quite a lot was the matching of mentors. Within matching and within looking to launch a program, one of the concerns we often hear from people is they're worried about not having enough mentors or more importantly, not having enough people who are high quality mentors. Jai, what are some of the things that you've seen successfully, either that you've implemented yourself with a customer that a customer has done to really attract and qualify the quality of mentors needed to make the program successful?

**Jai Chaggar:** Of course I think this can be just filled into five main buckets. I think first you want to start off with creating mentor personas and just defying criteria for, you know, who is eligible to be a mentor. And that actually helps you understand what are my mentors needs, wants, and goals, which in turn can help with your internal recruitment of mentors. And then secondly, I think allow people to join as both mentors and mentees. If you do opt for a mentee led pairing process, you'd be surprised to see who picks who within a program. Personally we've seen so much success when users lean into mentor role roles. And something we try to emphasize is, really allow individuals to take that role if they see fit. Because people can provide so much insight regardless of their tenure at a company, their seniority or past accomplishments. You can truly be a fantastic mentor for someone at your org regardless of those sort of key traits that we think of as the typical mentor. So that's something that we definitely emphasize with our admin then really does lead to some amazing stories. Thirdly, as Dan mentioned, hosting training sessions. I think that's super pivotal as well. This helped build confidence in those tenured mentors that have had lots of experience being a mentor in the past, but also those that are considering, putting their hand up and leaning into a mentor type role for a program. So training sessions are pivotal from a confidence perspective. Next, I think, tying your mentorship program into other developmental programs at your organization. So you're going to want to look for ERG leaders, people in leadership positions or rotational programs at your organizations. And then what you're going to going to want to do is, tap into those communities to find quality mentors or advocates for mentorship within your own organization. And then lastly, Jodi mentioned this a little bit, but find and celebrate your champions. These are going to be mentors who are always showing up and are incredibly excited to participate and at the forefront of being the key mentors for your program. At together, we actually have a wonderful feature in our reporting suite that many of our organizations leverage that highlights the hours of mentorship put in from both a mentee and mentor role type. And one of our largest enterprise customers really leans into this and they've even given out awards for mentorship hours in the programs that they've had. They've actually gone as far as coining these individuals as super mentors. And they're known as super mentors across their organization. And these super mentors have even become integral in helping that organization shape what future mentorship programs should look like. And something that's even helpful for us is having meetings with them to understand what's going well from a user standpoint and how can you continue to lean into that success and expand even further with the groups that you're trying to attract into your program. So those are a few key things that I've seen successful in terms of attracting quality mentors to your program.

**Brent Jensen:** Amazing. Dan, any thoughts on that?

**Daniel Horgan:** Yeah, Jai, I love how you thinking buckets, because I'm very similar. So I'm going to add three more buckets. We've got eight buckets total of tactics here. So the next one I would highlight is just influencers. When you think about your program design, once you've narrowed it down and you say, okay, this is the ideal mentor that we are trying to attract to this particular program, really challenge yourself to say who are the influencers of that particular target demographic, right? So for example, if you're really trying to engage a lot of middle management as mentors in your program to help them further develop their people management skills, their interpersonal skills, et cetera, think about senior leaders being influencers and the way that you can engage them is through storytelling. So inviting senior leaders to share their own mentorship stories when it's worked, when it hasn't worked on their journey and why. Sharing direct communications. So reaching out to middle managers and saying, hey Jai, I've worked with you on a number of projects. I see that you've got these amazing skills that would really benefit so many of our employees here. Would you consider joining this mentorship program as a mentor? And then in their engagement, we try to fold in some of those influencers into our larger group coaching sessions. So it's like leadership spotlights where the influencers have a chance to share their personal stories and experiences that aligns to the roadmap that we've facilitated for that particular program. The second bucket I would add is just we've started to incorporate some pre-screening scenario-based questions. You can only gather so much information in an application, but when you ask people, here's a scenario that we've seen as a common situation in previous mentoring matches, for example, I reach out to my mentee, they don't respond, do you A, just choose not to continue forward. Do you B, write them a second time or do you C, write the program manager? And a three series of those scenario-based questions, we start to see is this individual intentional and are they going to take the initiative necessary to set this mentoring relationship up for success as a mentor in the program? We want them to assume positive intent. So are they just disregarding somebody if they just don't communicate? Or are they seeking to understand the context behind the situation? Again, qualities that will set people up for success as a mentor in the program. And then last but not least, Jai and I just want to build off something you mentioned. Cause I see this happen a lot with mentoring programs, is the recognition sometimes lands on the wrong data points. So again, when we think about recognition, a hundred percent, it could be the hours that you are committing to a mentoring program, but I would really challenge people to think about how you're tying your recognition and your celebration of mentorship to the behaviors and the actual outcomes that you're setting out to achieve in your program. So whenever you're doing spotlights on mentors and mentees, really talk about the behaviors, the tactics that those two are using in their relationship that's helping to set them up for success and what that success milestone is that they've achieved in route to the journey or the goal that they're trying to, to get to. So those would just be three additional things I would add to Jai's, your initial list.

**Jai Chaggar:** Love that. So many buckets.

**Brent Jensen:** Jodi, any more buckets to add?

**Jodi Petersen:** I will add just one talking point and then I want to, do we have a little bit of time, a couple minutes?

**Brent Jensen:** Yeah, we do. We're towards the end. We got 30 minutes left in the presentation.

**Jodi Petersen:** Okay, good. So when we're thinking about the expectations, I think, Jai, you touched on this, documenting those expectations, responsibilities, you know, what is it going to be involved, including the time commitment, you want to do that for your mentors and your mentees. Even though we're talking about mentor recruitment, it is super important that mentees understand their responsibilities because unlike other learning styles, they're the drivers of the relationship. It's their development. They should be creating the agendas and having the goals and working towards those. And so it's a different dynamic and it can be intimidating for people, especially if your program is structured. So they're being mentored by someone who's maybe a couple levels higher than them in the organization. If the mentees are not prepared for the experience, that can lead to relationships ending prematurely. And then mentors abandoning the program, they don't want to come back because it's not value, it's not a good use of their time. They feel like the mentees aren't prepared. So that would be one thing that I would add. I do want to talk about four common challenges with mentor recruitment. And so you can be thinking about this, the approaches and the buckets that Jai and Dan talked about in light of these four common challenges. And the first one is availability. So employees are super busy, we're all super busy, we can't be in two places at once. Depending on the structure of your program and who your desired mentors are, you really need to consider what business area or areas those individuals come from because they may be busy at different points of the year. And so you really want to examine your program cycle, make sure that you're adapting to the mentor availability and setting expectations accordingly. The second one would be awareness. So people can't sign up for our program, they don't know about obviously, and you might be thinking like, if you've launched a program, you're thinking, how could you not be aware? I sent out all these emails, I wrote these articles, I did a blog, I went on the webcast. But the thing is, is that we all ignore things that aren't relevant to us in the moment. Because remember, we're all super busy. So if you've ever met a person who has deleted email, because you didn't think it was important to you, it happens. So just be aware that the email communications and some of the, you know, you may need to get creative and tap into some of those other buckets that Jai and Dan were talking about in terms of awareness. The third is motivation. So it can be difficult to gauge the employee motivation to be a mentor. There are inherent personality traits that affect a person's motivation. Some people are really intrinsically driven to help others. Some might do it for their own personal recognition or to be rewarded for their work. While others who may be driven by money or possessions will participate if they believe it can advance their careers in a company. I don't recommend paying mentors for being mentors, but that's a whole different conversation. But you really want to figure out, okay, how can we communicate and how can we tailor or customize our communications to tap into those motivations personas, developing personas, as Jai mentioned, is a really good way to kind of get your head around who you want to attract and why some mentors might stick around, some might leave after one cycle or some never end rule at all. And then the fourth bucket is knowledge and skills. We tapped on this a little bit, but you need to ensure that the mentors have the expertise and the core mentoring skills to be effective. Many mentoring programs assume that only people, leaders can mentor. As I think it was Jai that you talked about. You firmly believe, I firmly believe everyone has something that they can contribute. They have something that they can share with another person, experiences, expertise and so if your program doesn't, but people don't inherently know how to do that, right? And so if your program doesn't provide training for skills for mentors and mentees on how to me be a mentor or how to participate in the relationship, then that may make it harder for them to succeed and may lower their participation. They might do it once and not come back, or they might be a mentee, not meet their goals and never become a mentor, right? And so that continual core skills training is another kind of challenge that people see that you're going to want to consider.

**Brent Jensen:** Amazing. Awesome. So, one thing I'm hearing this is through every single question that we've had is the importance of goals. And now while goals outline the purpose and the direction to which your program is trying to work towards a big hurdle in sort of understanding whether or not it's achieving that, is measuring the impact of mentoring. So Dan, this is a question for you. How are some of the ways that the impact of mentoring on an organization, whether corporate or nonprofit, social enterprise, what ways have people measured those? And what can people look out for when trying to measure the impact of the mentoring program?

**Daniel Horgan:** Yeah, absolutely. Great question. So I got lots of ideas around this one. So first and foremost, what you measure absolutely needs to and should align to your program goals. I see a lot of people who make long lists of data points that they're going to collect throughout a mentoring program. And although that's a good exercise, maybe at first. Filter yourself down to the most important data points that align to the specific program goals that you have publicly stated that this program is designed to achieve and that you've recruited mentors and mentees to participate in the program around. So I think starting there is like super, super important. And as those can relate to a lot of different things, it can relate to recruitment efforts. So trying to recruit, diverse talent to your organization and then help that talent expand their professional network, further develop their skills and continue to grow in an organization. How are you specifically measuring each of those three points as it relates to their engagement, say, in a six month mentoring program? Or maybe it's related to overall brand awareness. One of the things that with a lot of early career talent that we work with on their road to employment and beyond is they say they're looking for companies that give them ample opportunities in a structured, organized way to build and diversify their professional network beyond their immediate team. So really being mindful of how are you building those webs of support within an organization? How are you helping the mentees and the mentors find the advocates, the allies, the partners in the organization to challenge their assumptions, continue to help them develop their skills and unlock new growth opportunities. When you're looking at measurement, I say look at it in three dimensions. Look at measures related to the individual, to the match and to the overall organization. So how is the individual benefiting from this particular relationship and experience? How has the match been in terms of its quality, in terms of its commitment to one another, in terms of the, what they're focusing on and the organizational outcomes tied back again to program goals, recruitment, retention, overall development. I want to build off of something that Jodi, you mentioned. So when I think of outcomes, I, again, try to encourage people to look at in four different ways. One is awareness. Through this mentorship experience, am I more aware of who this organization is, the business context that I need to do my job more effectively? Am I more aware of the organization's commitment to its top priorities? For example, we do a lot of work with ERGs as well, and through this mentorship program, am I more aware of its DEI commitment, not just in talk, but in action. The second is connection. Set a target goal. In this six month mentorship experience, you'll expand your professional web support by four new connections beyond the mentor mentee that you've been matched with. Be able to point back to those relationships and the value that you've gained from them. I think upskilling, how have you taken your current competencies to the next level? Be sure to sync up your competency language in any sort of survey or focus group to the same language that the learning and development team or talent development team is using within your organization. So they see the alignment. It's not competing, but it's really much in sync. And then lastly is looking at engagement. So in terms of not just in the mentorship experience, but how are the participants of this mentorship program feeling more connected, more engaged, more satisfied with their employment or with their membership in the association of the organization that they're a part of. Last thing I would just mention, which is an important point is, don't just get hung up on the quantitative information, the qualitative elements. You really want to understand the lived experience of the participants in the mentorship program. Not just in terms of assessing the impact on the program itself, but really understanding how you can pull that information and apply it to your next recruitment phase or the marketing of these initiatives moving forward.

**Brent Jensen:** Amazing. Jodi, any builds on that?

**Jodi Petersen:** Yeah, I think, Dan, you touched on it, but just reiterating that measurement. A lot of times when you're developing new programs, measurement's the last thing you think about, right? You want to get everything done, and then when it's launched, you're like, woo, okay, how are we going to do this now? But measurement is actually should be the first thing that you think about because it does go to your overall objectives of the program. And if you don't have those set that are anchored to your organization's top talent management or DEI objectives, you're really going to get lost, your program's really going to get lost. It's just going to get out there and it may not be seen as the value add with. When we're thinking about like executives, executives care about money, they care about the bottom line, and they care about those financial impacts to the organization. And so you want to be able to be thinking about those right off the bat and to be able to show those. I think you also want to think. And some of those may help guide you through the program design process. You may do a different design based on what those impacts are. I think the other thing that you want to think about is things that you already know about your employees. So for instance, if you have a one-on-one mentoring program with the goal of boosting engagement and improving overall employee performance, maybe on their performance review, you can't simply measure whether those people in mentoring are more engaged or have a higher performance review score than those that aren't. You have to consider where people were when they came into the program, because we all know that people who are more engaged are more likely to join your program in the beginning. And so you really want to control for those variables that you're not overstating the impacts that your employees are having or your program is having in the organization. What I will tell you is that we, mentoring program managers are not inherently data people. So I'm not expecting everyone to go off and develop this robust measurement design system. Tap into the people in your company who are the experts. You have HR analytics people, tap into those, talk about your program with them, take their advice and leverage their assistance as much as possible.

**Brent Jensen:** Amazing. Jai, any final comments on that?

**Jai Chaggar:** Yeah, I think was outlined perfectly by both Dan and Jodi. I think I'll just sort of build on just the measurement of the impact. I think two key ways that we sort of look at it at together, I think the first one is surveys that we leverage. So this has a great way in terms of qualitative and quantitative measurement that both Dan and Jodi sort of talked about. So we use pre-built surveys to measure core metrics before, during, and after the program to get a holistic sense of progress within a program. So I think qualitatively, you know, they're great for measuring people's feelings about the progress that's otherwise hard to measure objectively. And you want to use that feedback to improve on your program as it goes on. As Jodi mentioned, you don't just want to wait until the end of your program to do a survey and see what's going on. The best way to do it is throughout and sending surveys after each session and see how trends are sort of progressing or doing a midpoint check-in with all of your mentees and mentors. What's working, what can we change for the second half of this program? And really ensure that you're listening to that feedback as it's coming at you, at that giving point in time, but also quantitatively as well. Surveys can help. So this ties to that match that Dan was speaking about and sort of keeping tabs at how that match is progressing throughout their mentorship journey. We do it from a quantitative standpoint as well, where you can actually see the progress progressing from three out of four stars to four out of four stars as the journey sort of moves forward. So surveys are a great tool that we leverage and then analytics to purely quantitative. As Jodi mentioned, if you're fortunate enough to have a dedicated analytics team, work with them on defining those core metrics of your program goals and measure the success before and after or what were those sort of key traits and characteristics that you wanted to get out of your program that you can measure from a purely quantitative standpoint. So I think those are two key ways to measure impact.

**Brent Jensen:** Amazing. Awesome. So I want to preface this by saying we've got about 18 minutes left from the presentation. Two more questions left. Would still like to have some of the Q and A time available to answer some questions, so we can work through these last ones a little bit quicker. Jodi, this one's for you. Most organizations where they're thinking about mentorship, there's a layer of senior executives that they need to get buy-in for whether it's getting resources for the program or just getting the green light to go for it. When you're making a business case for a mentorship program, what should the people be, who are making that business case be thinking about what are the moving parts of a business case and what is important in order to win buy-in?

**Jodi Petersen:** Yeah, I think it's important to win buy-in by, as I mentioned before really trying to relate everything back to what are the benefits for the organization. Those can be people benefits, they can be financial benefits. When we are thinking about creating presentations for our peers, whatever, we can get bogged down into providing lots of data and lots of slides and really wanting to get in the weeds on things. And what I will say is when you want it, when you're creating a business case, as succinct as you can make it with the relevant executive level information is important. Now, there's some things, I mean, you can look up business cases and get all the important elements. But what I would say is that cater it to your organization. Understand who your stakeholders are, how they've responded to other business case programs before, what programs you currently have in your organization. And so do a little due diligence. Go out and talk to other leadership development programs, talent management programs that are existing in your organization and find out how they gathered support from the stakeholders. As much as you can leverage things that have worked in the past, we'll give you that little extra edge as you're presenting your business case. And having those relationships with those other programs may give you some collective ideas about how you can leverage communications or resources or integrate mentoring within their programs or anchor it to their programs. And so there's a lot of different really value added reasons for going forward and talking to other groups. As far as when I'm providing executive summaries for not necessarily the business case, but executive summaries, I like to leave like a one page leave behind with the key relevant information that the very senior leader would want to know, because that's what they're going to pick up. Again, you may give your presentation, but when you go in there and they're thinking about it later, they're going to walk away. They're going to reference that one executive summary. So make sure you leave that behind with them.

**Brent Jensen:** Amazing. Yeah, no, the executive summary is definitely a key point in all business cases. Jai, any builds on that?

**Jai Chaggar:** Yeah, I'm mean, Dan, I'm going to bring back the buckets. So three key buckets that I think are important here. Firstly, what Jodi's chatted to is relating the benefits to the stakeholder. Don't need to go into that in too much more detail. Jodi did a great job of outlining that. Just, you know, what are your core goals of your organization? And tying that back to stakeholders involved. I think the second one is making a detail plan. So I think you really should answer the classic who, what, where, when, why, and how. So who will be involved? How is the program going to be formatted? Is it one-on-one? Is it groups? Is it cohort? Is it evergreen? What criteria are you going to be math on? You know, what would help ensure that your user’s mentorship sessions are successful? And when, where, how and how often are these users going to meet? You also want to be pragmatic, but also inspirational when you're making your plan. Mentorship is an art and a science. So the best proposals, make sure to include both. And then also just planning your resources. So time is the largest resource normally needed when you're making this plan or creating a program. But software can really help significantly launch and manage your program and expedite that. So one of my favorite stories from working with one of our customers is, you know, before they started leveraging together software they used to tell us that they'd have sticky notes with mentee names and mentor names, and they would just put them up on a wall and they would just look at the sticky notes and based off of key traits that they might know about these individuals, they'd match them up. But if not, it would be a lot of guesswork of just being like, okay, maybe these two are going to be a good fit. Let me just pair them together. And they said it would take them so much time and it's just guesswork at the end of the day. So again, that software can really allow you to outline what criteria you want to use to match those users on and save tons of time by helping you do those matches or bubbling up those best potential matches for your mentees and your mentors. And then lastly, create an evaluation plan that defines success criteria. So you define what does success look like and how are you going to measure success? I spoke about it in the last answer, but surveys are a great feature to define and measure that success that you've put out in the first place.

**Brent Jensen:** Amazing.

**Jodi Petersen:** Jai, I'm raising my hand. I am from the school of index cards on the dining room table for 40 hours. That's me that I've been there. Yep.

**Jai Chaggar:** And then, you know, when you, where are you eating dinner? There's no room to eat dinner.

**Jodi Petersen:** Well, exactly. You're not, you're eating takeout from a box cause it's taken up all your time as a, you know, whatever, trying to do all the things.

**Jai Chaggar:** Yeah.

**Jodi Petersen:** I will say one thing when you're thinking about, there's different approaches when you're thinking about creating the business case for an enterprise program, which may have multiple smaller programs under an umbrella. You may not be, you may go in more with your kind of strategy and roadmap, prioritized roadmap of implementation than the detailed designs of programs because you may not be there yet. So depending on if you're going writing a business case for one program or writing a business case for an enterprise program, your approach may vary a little bit different. Well, a little bit.

**Brent Jensen:** Amazing. Dan, maybe you would like to speak to the difference between that.

**Daniel Horgan:** Yeah, I just wanted add a couple things that maybe haven't been mentioned yet. One is just when you're speaking to any senior leader or decision maker, frankly, I think it's super important to play to both heart and the mind. So heart is obviously like playing to their own lived experience and helping them to reflect on their own journey and the role that relationships in general, whether it's formal or informal relationships have played in making decisions or in helping to unlock new opportunities. From the mind perspective, really think again about who are the influencers for this individual, who's a decision maker? And by that I mean who are they comparing themselves to, right? Who are they competing against in the market? And so, for example, if you're trying to develop or pitch, a mentoring program focused on recruitment, think about the competitors of your organization or your membership organization and say like, what are they doing to help attract people to the network? And are things, there are lessons learned that we can pull into the business case that we're trying to make for why this mentorship program will help us have a competitive edge and attracting the talent that we're trying to attract. Two is, I always suggest building off of existing strengths. So really take a strength-based approach, you know, not just in your mentoring relationships that you're helping to spark, but also in the way that you're making the business case, right? Building off of existing initiatives. We're working with a global company now in which we've actually layered into their senior leadership development program and to their emerging leaders program and pitched the mentorship program as the next step in those two. I know early in my career I participated in a six month emerging leaders program. It was an amazing experience and it ended after six months with no additional action. And so the mentorship is, okay, how do you take these lessons learned in these experiences and apply it now in a different context? And again, that helps to layer on something that's already viewed as a strength within the organization. And then lastly, as I think it's super important to identify, for everybody's sort of multi multi-dimensional ROI, so this isn't just going to help us with retention, but if we are able to retain people and they're able to strengthen their engagement at the same time and feel more connected to the community, we'll also likely drive more innovation. Because people will be more open, more honest, more willing to explore new ideas or take more risks in the way that we're evolving our business. So again, painting the picture beyond just one outcome and showing how things are layered, whether it's in the short or the longer term as well, is super important.

**Brent Jensen:** Amazing.

**Jodi Petersen:** Yeah. Dan, when you're thinking about… sorry. When you're thinking about the adding mentoring onto other programs, I think it's a, as we're thinking about the new emerging trainings in the DEI space, we've been doing quite a bit of work with DEI groups where we're talking about you know, they have, for instance, they'll have a cultural competency training. How can you have used mentoring either one-on-one group or peer, depending on their organization to not only carry those learnings forth and have people have support as they're going out in the organization trying to drive change and practicing what they learned, but also adding accountability and creating action. Because in that DEI space, learning is one thing, but if you're not acting on that within your organization, then you're not going to achieve those goals. And mentoring is one way through various types of mentoring is one way that you can help solidify those learnings and turn them into action.

**Brent Jensen:** Amazing. Wonderful. I want to pivot a little bit towards the case of certain programs who have seen success or with a pilot program who again, has kind of proven out that first concept that mentorship is an impactful endeavor and it's an impactful program for the company. Jai, this one's for you because I know you’ve helped a lot of companies do this. But what can program managers do to properly scale their program to the rest of an organization?

**Jai Chaggar:** Yeah, great question. I think there's two major ways to scale mentoring within an org. I think you know, firstly with scaling, you want to include more people within your organization. So I think the first key thing to look at is solving those minor inconveniences first and making any necessary tweaks before you expand. Small problems can become much bigger as you scale. So you want to make sure that by doing a test or a pilot group you're really getting those kinks out early and you're able to take any feedback and that'll allow you to scale at a much more successful rate and pace. And some of those bigger problems with scaling to a larger number of employees are tied to, you know, the internal communications, registration numbers and capturing that registrant data. How are you going to match even more pairings as you start to scale a lot bigger to your organization? And software does really help solve all of those issues. And I think the second key thing to scaling is reevaluating and improving your program, as I mentioned. So integrate your learnings. This may include updating session content based on feedback. You know, we've all talked about hosting training sessions. Maybe you realize that's important as you scale. And just figuring out your program branding and mentee and mentor recruitment. I think we've talked about a ton in the past, but leverage your success stories from your test program or your pilot program to really spread that awareness across your organization. One of my favorite stories with you know, scaling with customers is with the United Nations. They started a pilot program with together back in 2020. They started with about a hundred users in a cohort format, and since then they've expanded to an evergreen format. They've listened to the feedback from their users and their admins, and now they've scaled their mentorship program to have over 2000 participants, which is extremely impressive. And then I think the second tip for scaling mentorship is creating additional programs within your organization or together what we like to call land and expand. So you identify key areas in mentorship that can be beneficial across your org. So, we've seen a lot of success with organizations that start off with one department or one program and expand to numerous departments across their organization. So recently Aveson and Young, they had a U.S program and a UK program that were running separately. But recently they launched a global evergreen program that was inclusive of all locations around the world and really fostered that ability to make connections with every single person regardless of where you are at Aveson and Young in the organization. So that's the land and expand you know, as you scale across organizations, but a big part of this is reflecting on your program. And that's also why we do check-ins and business reviews with our customers as a way to identify what's working and how can we scale and improve your program going forward and make sure that you're seeing as much success as possible.

**Brent Jensen:** Amazing.

**Daniel Horgan:** I think those are the two key things on our end.

**Brent Jensen:** Great contributions, Jai, Jodi. Any builds on that?

**Jodi Petersen:** I just want to make a note about pilots. So when we're talking about pilots, sometimes you can get into the mode of that. A pilot is just like a program thrown together with bubblegum and Popsicle sticks, and it doesn't really fully represent your, what will be your eventual program. And so I always like to say like, start small with a soft launch, which will give you that time to tweak and adjust, but don't do that at the expense of putting in the design work upfront. You want to do that work and then you want to start small where you can tweak and adjust, but you're going to have better outcomes if you do all of your designing and all of your planning with scale in mind. And so I just wanted to throw that out there. And then a lot of the things that Jai said, automate as much as you can, use a platform like together, provide training both skills and program training. You don't have to do it alone. Build community, leverage people to help you. There are a lot of people in the organization who are passionate about mentoring and use those. I would say as a former program manager we always help people, our mentors and especially our mentees to set boundaries. And you do that through the beginning of the process and the partnership agreement form. But it's important for you as a program manager to set boundaries as well. Especially when you're working on a scaled program. You may have, you know, if your program has, our program had 20,000 people in it, okay, I can't answer every person's question individually. And so I had to find ways to answer their questions and make them feel like they had a personalized touch. But that was a scalable for me. And so I did things like holding office hours. I leveraged mentoring champions to host office hours. For me, we had a robust FAQ. If there was a problem, we had an intentional process and they would have more personal touches with that. But really setting those boundaries for yourself so that you can continue to focus on growing your program, developing new programs, and that you're not spending your entire day answering email after email of small questions for people.

**Brent Jensen:** Amazing. Dan, we got two minutes left. Any, 90 seconds to midnight kind of suggestions here.

**Daniel Horgan:** Yeah, just two things I think are super important for people, just acknowledging that people are probably all over the spectrum in terms of maybe just getting started or maybe running more advanced programs. The one thing I would just encourage from a lot of this work is don't chase the numbers just for numbers' sake. It sounds great. Executive leaders will put lots of pressure on you to scale. And just being able to have a talking point that we have x number of people in a program. Always make sure that as you’re scaling, the quality of that experience is aligned to that scaled quantifiable growth. So if you start with 24 and they have 90% satisfaction rate, continue to build, ensuring that the satisfaction rate, the target outcomes of the program align to the number of people that are engaging. And then two, as I think it's really important to acknowledge that, you know, why do we do these mentorship programs in general? From my perspective, I think we're trying to create more relationship-centered inclusive environments in the workplace and beyond. And to really challenge yourself to say there are employees across the spectrum, some of which are looking for or need a more structured guided experience and others that are much more open to a self-directed experience. And so there's formal, there's informal mentorship. So when thinking about scaling, just think about how you're strengthening the quality of relationships, the quality of connections within your organization, which can be done in all sorts of ways. So two things just to, to keep in mind.

**Brent Jensen:** Amazing. Thank you so much for that. And unfortunately, we do not have time for the Q and A. I was really hoping we could, but there's a lot of great discussion, a lot of fantastic formatted structured answers, which we'll make great for social posts and clips, and we're happy to distribute those. In the absence of Q and A, we will be following up in our newsletter tomorrow. We'll be getting answers to some of the questions that have rolled in. But until then, feel free to check out our website. We have tons of resources, guides, and handbooks on how to actually implement a lot of the stuff that we talked about today. We'll also be sending out the best way to get in touch with and learn more about the work that both Jodi and Dan are doing through their organizations in a follow up email with the recording. So with everything said today, Dan, Jodi, Jai, thank you so much for joining us. I hope the audience, I hope you got a lot of value out of this. I know it was really interesting to hear all of your differing takes on stuff and your views. So again, I thank you. And again, if there's any questions, feel free to visit our website and book a demo.

**[Music]**