CBM - Client Addministration Team Users Guide

Getting Started with Client Assignment

*Who this guide is for.*This guide is for the CBM**Client Assignment**team, and it assumes you've already read the CRM Introduction — so you know what Contacts, Companies, Engagements, and Sessions are, how to sign in and navigate, and how the records connect. It picks up from there and walks you through what your team does.

*What your team does.*Your team makes sure every client is matched with the right mentor. In practice that means reviewing new**Engagements**as they come in, checking that the records are correct, and assigning each one to a capable mentor. You also handle engagements that come back to be re-matched — ones a mentor has**declined**, or that have gone**dormant**. The sections that follow take these in turn.

*Where engagements come from.*New engagements arrive in the CRM from the**client intake form** — the form a prospective client completes to request mentoring. Each submission creates a new Engagement, with the client's information, for your team to review and assign; you don't create these by hand.

*Signing in.*You reach the CRM the same way as any user — see "Signing In" in the Introduction. If you're ever unable to sign in, or can't see something you think you need, contact**Sharon Rose** [contact method to be added].

*The rule that runs through everything — mentor and user together.*The single most important habit in this role: whenever you assign an engagement, you set**two**fields — the**mentor**(the person who will do the mentoring) and the matching**user-assigned**field (their login account). They go together. As the Introduction explained, what a person can see is governed by their**User account**, not by being named as the mentor — so if you set the mentor but not the matching user, that mentor won't be able to open their own engagement. Every assignment in this guide sets both.

Finding and Reviewing a New Engagement

*Finding new engagements.*Your work starts at the**Client Assignment Team**dashlet on your home page. It lists the engagements that need your team's attention — those with a status of**Submitted** (new, straight from the intake form), along with**Assignment Declined**and**Dormant**ones that have come back for reassignment (Section 4). A new engagement to review is one marked**Submitted**.

*Opening and verifying the records.*Select a**Submitted**engagement to open it. Because the intake form creates the engagement together with the client**Company**and the client**Contacts**, your first job is to confirm those are right and properly linked:

- the**Company**— the client business (or a "(Pre-Startup)" placeholder if the business doesn't exist yet);
- the**Contacts**— the people at the client who'll take part;
- the**Engagement**itself — that it's connected to the right company and people.

If something is off or missing, correct it before you assign — a clean record now saves confusion later.

*Reviewing what the client needs.*With the records verified, read the substance of the request: the client's**industry**and the**mentoring areas**they've asked for. This is what you'll match a mentor against in the next section, so understand it clearly before you go looking for the right person.

There are two places to find a list of Pending Client Engagements Reports, or the CBM Engagements Panel.

The Pending Client Application Report

The Reports page provides a number of reports that may be useful, and they are pre-configured to show all Pending Mentor candidates. To access the Pending Mentor Candidate report:

1. Click on the Reports link on the left side of your screen.
2. Select the Folder “Mentor Admin Team Reports”
3. Click on “Pending Mentor Candidates” to display the report.

Assigning a Mentor

Finding the best match. With the client's **industry** and **requested mentoring areas** in mind (Section 2), open the **CBM Members** area to review the available mentors. Look across each mentor's profile for the fit that matters:

- **focus / expertise areas** — do they line up with what the client needs?
- **availability** — are they open to taking someone on right now?
- **capacity** — do they have room for another engagement?

Scan or filter the list to narrow to capable mentors, and choose the one who best fits the client. Consulting a colleague or doing a little research before you decide is part of the job — there's no rush to assign.

Making the assignment. Open the engagement you're assigning. The goal isn't just to name the mentor — it's to give them access to everything they'll need (the engagement, the people, and the client), so a few steps repeat the mentor across related records.

1. In the engagement's **Assigned Mentor** field, select the mentor you chose.
2. In the **Assigned Users** field, select that **same** mentor. (This is the access step — the Assigned User, not the Assigned Mentor, is what actually lets them open the record.)
3. Change the **Status** to **Pending Acceptance**, and save the engagement.
4. Give the mentor access to the client's people — for each **Engagement Contact**, open the contact's record, set its **Assigned User** to the mentor, and save.
5. Open the **client record** linked to the engagement, set its **Assigned User** to the mentor, and save.

Why the extra steps. Access follows the Assigned User on each record, so the mentor needs to be the Assigned User everywhere they'll look — the engagement, its contacts, and the client. Miss one and the mentor will see the engagement but won't be able to open a contact or the client.

What happens next. Setting the status to **Pending Acceptance** hands the engagement to the mentor: it appears in their My Engagements list, where they accept it (moving it to **Assigned**) or decline it (sending it back to your queue as **Assignment Declined** — Section 4). Your part is done once a capable mentor and their matching user are set and the status is **Pending Acceptance**.

SCREENSHOT TO ADD *an engagement in Edit mode, highlighting the Mentor, Assigned User, and Status fields.*

Adding a co-mentor or transferring an engagement. The same fields let you adjust who's on an engagement after it's assigned:

- To add a **co-mentor**, add them to the **Assigned Mentor** and **Assigned Users** fields alongside the primary mentor, and give them access to the contacts and client the same way (steps 4–5 above) so they see the full picture.

- To **transfer** an engagement to a different mentor, replace the mentor in those fields and move the **Assigned User** on the contacts and the client to the new mentor as well.

Mentors can make these same changes themselves; the Mentor Guide covers it from their side.

Reassigning Declined and Dormant Engagements

Not every assignment sticks the first time, and that's expected. Two kinds of engagement come back to your queue, and you'll see both in the **Client Assignment Team** dashlet alongside the new **Submitted** ones:

- **Assignment Declined** — a mentor reviewed the engagement you assigned and decided it wasn't the right fit, so they declined it. It returns to you to be matched with someone else.
- **Dormant** — an engagement that had been under way but has gone inactive, and has come back to your team to be picked up again.

Reassigning is the same process. Handling a returned engagement works just like a new one: review the client's industry and requested areas, look across the **CBM Members** for a capable mentor — a different one this time — and repeat the **Section 3** assignment steps for them: set the **Assigned Mentor** and **Assigned Users**, move the **Assigned User** on the engagement's contacts and the client to the new mentor, and set the **status** back to **Pending Acceptance**. The engagement is then offered to the new mentor.

A quick look before you reassign. It's worth a glance at why an engagement came back. For a declined one, the records and the client's needs haven't changed — you're simply finding a better-matched mentor. For a dormant one, check the engagement's history — its Sessions and notes — so the next mentor knows where things stand before they accept.

Getting Help and Next Steps

*Where to get help.*For anything about**access**— signing in, your password, or not being able to see the dashlet or a record you think you need — contact**Sharon Rose**[contact method to be added]. For judgment calls — a hard-to-place engagement, or which mentor is the right fit — a colleague on your team or your lead is usually the best sounding board.

*Your workflow at a glance.*Working from the**Client Assignment Team**dashlet, you review each new**Submitted**engagement and verify its records (Section 2), find a capable mentor against the client's industry and requested areas (Section 3), and assign it by setting the**Assigned Mentor**and **Assigned Users**, making that mentor the**Assigned User**on the engagement's contacts and the client too, and setting the status to**Pending Acceptance**. Declined and dormant engagements come back to the same dashlet, and you reassign them the same way (Section 4).

*The one thing to never skip.*Make the mentor the**Assigned User**everywhere they'll need to look — the engagement, its**contacts**, and the**client**, not just the Assigned Mentor field. It's the easiest step to overlook and the one that quietly breaks things — a mentor who can't open their engagement or its records almost always traces back to a missing or mismatched Assigned User.

*Keep the Introduction handy.*This guide builds on the CRM Introduction — the records, how they connect, and why access follows the User account. Keep it nearby as a refresher whenever something is unfamiliar.

*Thank you.*Your matches are where every mentoring relationship begins. Getting the right mentor — and their access — set up cleanly is what lets the work start smoothly, so thank you for the care you put into it.