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.

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