

# Getting Started as a Mentor

## 1. Getting Started as a Mentor

### *Who this guide is for.*

This guide is for CBM mentors, 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 find your way around, and that what you can see is governed by your User account. This guide picks up from there and walks you through what you actually do as a mentor.

### *What's expected of you.*

The CRM is where your mentoring is recorded. In practice that comes down to a few things: finding the clients you're assigned to, logging each session after you meet, following up with the people you mentored, and keeping your engagement and your own profile current. The sections that follow take these one at a time.

### *Signing in.*

You reach the CRM the same way as any user — see "Signing In" in the Introduction. As a mentor you have a User account for logging in; if you're ever unable to sign in, contact **Sharon Rose** [contact method to be added].

*Your CBM Member profile.* Your information lives on the **CBM Members** tab — this is your CBM Member profile. It holds the details CBM uses to match you well and stay in touch: your **availability**, your **focus / expertise areas**, your **capacity** (how many engagements you can take on at once), and a short **bio**. Keeping these current helps coordinators pair you with the right clients.

## To update your profile:

1. Open your own member record — search your name, or find yourself on the **CBM Members** tab.
1. Click on the Members Name to display the Mentor Details page.
1. Click on the **Edit** button in the upper left of the screen.

1. Update your availability, focus areas, capacity, or bio.

1. Click on the tabs to gain access to Mentor Profile or Photo information

1. Select **Save**.

Your updates are visible to coordinators right away, so it's worth revisiting your profile whenever your availability or focus changes.

Name	City	Mentor Status	Mentor Type	CBM Email
<input type="checkbox"/> Jim Beem		Candidate	Mentor	
<input type="checkbox"/> James Breiner		Candidate	Mentor	
<input type="checkbox"/> sharon Rose		Candidate	Mentor	
<input type="checkbox"/> David Schwieterman		Candidate	Mentor	
<input type="checkbox"/> Richard Brooks		Candidate	Mentor	
<input type="checkbox"/> Fred Flinstone		Candidate	Mentor	
<input type="checkbox"/> Dan Yurman		Candidate	Mentor	
<input type="checkbox"/> Brad Swimmer		Candidate	Mentor	
<input type="checkbox"/> robert fedor		Candidate	Mentor	
<input type="checkbox"/> Tom Mendelsohn		Candidate	Subject Matter Expert	
<input type="checkbox"/> Matt Mentor		Candidate	Mentor	
<input type="checkbox"/> Milt Sierra		Candidate	Mentor	

**CBM Members > Douglas Bower**

[Edit](#) [...](#)

**Contact Info** | **Mentor Profile** | **Profile Photo**

Contact Info	Contact	Mentor Status
Name Douglas Bower	<a href="#">Douglas Bower</a>	Candidate
CBM Email doug.bower@cbmentors.org	Personal Email doug@dougbower.com	
Mentor Start Date Mar 03, 2025	Mentor Type Mentor	
Street 345 N. Main St	Phone +1 216-612-4870	
City Chagrin Falls	Postal Code 44022	

**Assigned User**  
Douglas Bower

Teams  
None

CBM Email  
doug.bower@cbmentors.org

Accepting New Clients

Current Active Clients  
1

Available Capacity  
9

Created  
Jun 02 00:42 - customapps

Modified  
Jun 11 14:52 - Admin

**Mentoring Info** | **History**

Assigned Engagements

Name	Primary Engagement...	Created At ^	Engagement Status
Sam Smith — Intake 2026-06-02	Sam Smith	Jun 02 13:07	Active

CBM Members > Douglas Bower

Edit ...

Contact Info **Mentor Profile** Profile Photo

Mentor Profile

Professional Bio  
Describe your work experience

Mentoring Skills  
None

Mentoring Focus Areas  
Accounting & Tax Services

Why Interested in Mentoring  
Why would you volunteer

Area Of Expertise  
None

AboutMentor  
None

Accepting New Clients	Maximum Client Capacity	Current Active Clients	Available Capacity
<input checked="" type="checkbox"/>	10	1	9

Total Lifetime Sessions  
None

Total Mentoring Hours  
None

Fluent Languages  
American Sign Language

Industry Sector  
Agriculture, Forestry, Fishing and Hunting

How did you hear about CBM?  
Newspaper

Years of Industry Experience  
None

Assigned User  
DB Douglas Bower

Teams  
None

CBM Email  
doug.bower@cbmentors.org

Accepting New Clients

Current Active Clients  
1

Available Capacity  
9

Created  
Jun 02 00:42 · customapps

Modified  
Jun 11 14:52 · Admin

Mentoring Info Managed Sponsors/Partners History

Assigned Engagements + ...

Name	Primary Engagement...	Created At ^	Engagement Status
Sam Smith — Intake 2026-06-02	Sam Smith	Jun 02 13:07	Active
Greg LaFrance — Intake 2026-06-01	Greg LaFrance	Jun 01 18:38	Pending Acceptance
Agape W8 Loss 2026-05-15	James Koran	May 15 15:47	Pending Acceptance

Client Requests + ...

Revision #2

Created 2026-06-17 20:46:57 UTC by Admin

Updated 2026-06-17 21:00:14 UTC by Admin