Assigning a Mentor

Finding the best match.

With the client's **industry** and **requested mentoring areas** in mind, there are two ways to locate available and matching Mentors:

- The CBM Members page can be searched and filtered to show mentors that might meet the Clients needs.
- The Available Mentors Report shows similar information, but provides more flexibility when searching for Mentors.

Locating Mentors via CBM Members

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?

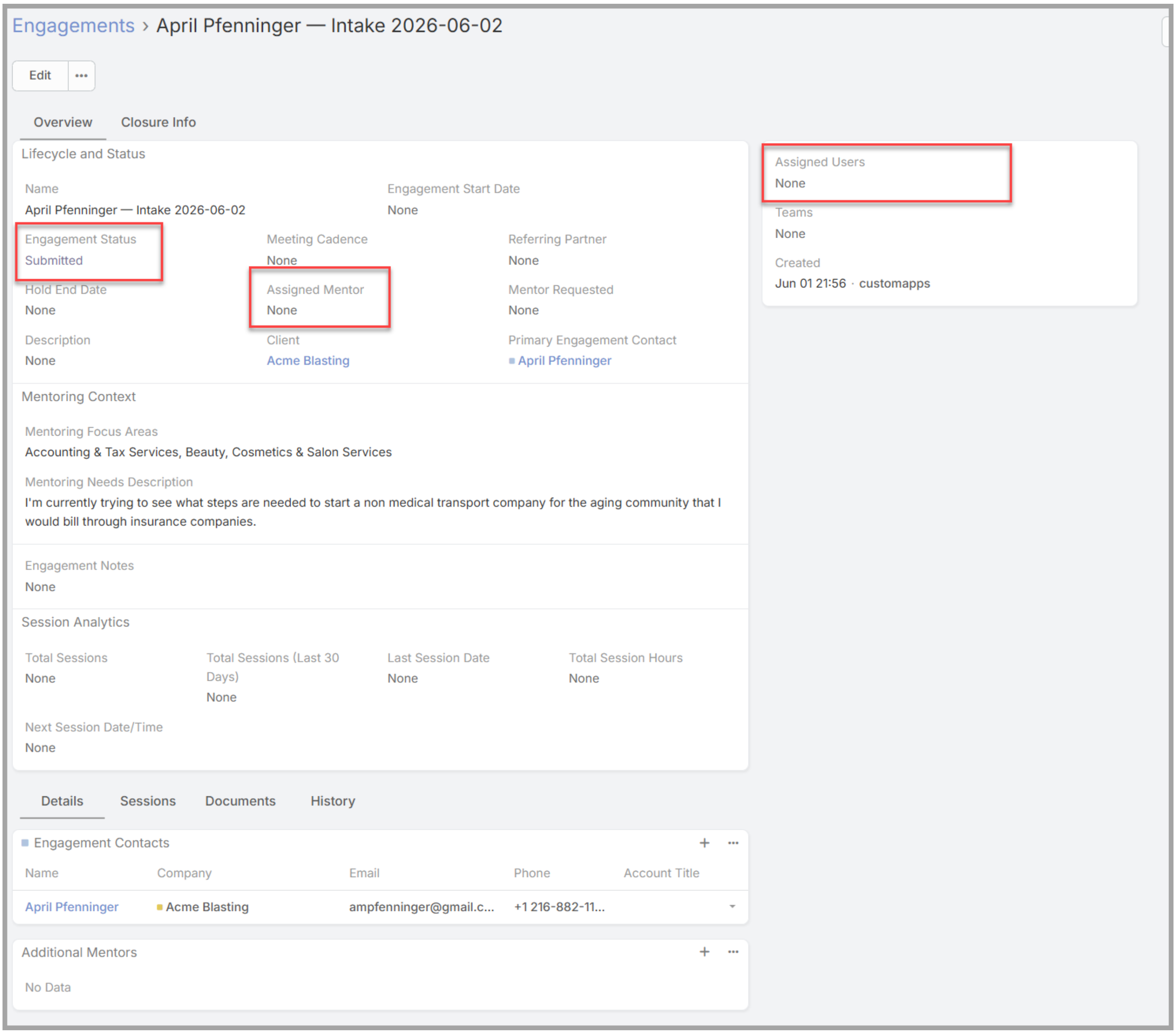
Scan or filter the list to narrow to capable mentors, and choose the one who best fits the client. Consulting a colleague or doing a little research before you decide is part of the job — there's no rush to assign.

*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. Select each of the Engagement Contact and select the mentor for the "Assigned User"
5. Click on the "Client" to view the Client record, and select the Mentor for the "Assigned User".
6. 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**). Your part is done once a capable mentor and their matching user are set and the status is **Pending Acceptance**.



*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**, select from the list of available Mentors to the **Assigned Mentors** 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.

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