

MENTOR MATCHMAKER

MINIMUM VIABLE PRODUCT (MVP) RELEASE NOTES

The Mentor Matchmaker search functionality assists the client in discovering suitable mentors who match their desired criteria including location, language, industry, expertise and mode of meeting (in person, phone, email, and video). This guide explains in detail how the Mentor Matchmaker search algorithm surfaces the best results based on these criteria.

May 2023

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Mentor Matchmaker - MVP Details

How Does the Mentor Matchmaker Work?

The system queries the mentors for location and language and uses an algorithm to weigh the results to determine how mentors are sorted. **Note: Mentor Matchmaker WILL include all available mentors in the search results regardless of whether they accept direct requests.**

Search & Sort Criteria

Summary

- Feature location: www.score.org/find-mentor/mentor-matchmaker
- If the user has set a location on main menu the location field on mentor matchmaker will default to the same location and the user can change the location to another location or to 'All Locations' independently of the site location setting.
- Each field is required to ensure quality matches
- Each parameter that matches has equal weight
- Mentors are sorted by the highest weight (number of parameter matches), in descending order.

How Locations are Matched

- If a user selects "All Locations", and has also selected a chapter from the site navigation, mentors from the selected chapter will be prioritized in matched results.
- All Mentors from the set chapter whose data points match search parameters at 50% or greater will be listed first.
- Once all matched mentors, above the 50% threshold have displayed, the next set of results listed will be mentors from nationwide.
- In this scenario Mentors from this Chapter could be anywhere from none to all of the results shown.
- It is possible that no search parameters will match with mentors from the selected chapter, in which case, all mentors listed will pull nationally. It is also possible that all results will be mentors from the selected chapter.

Search Filter Options

- Clients can narrow their search by selecting a specific location (chapter) and by choosing multiple languages, modes of communication, industries, and areas of expertise..
- If a user searches on a specific chapter/location, languages, and modes of communication and there no mentors in the chapter that match at least one of the selected criteria, the search will return no results. Industries and areas add weight to the search but do not require an exact match.

Search Fields and How Results are Surfaced and Sorted

The following list explains the search algorithm in detail. Each search parameter is assigned a weight, or point value. The more matches there are between search parameters the mentors data points, the higher the point value. Mentors with higher point values will then appear in the search results.

- Location
 - Must match
 - Weight: One Point

- Meeting type and Language
 - Must match at least one value
 - Weight: One Point for each match
 - Minimum one point, max four points
- Language
 - Must match at least one value
 - Weight: One point for each match
 - Minimum one point, max equals the total number of selections
- Industries
 - Are NOT required to match
 - Weight: One point for each match
 - Minimum zero points, max equals the total number of selections
- Areas of Expertise
 - Are NOT required to match
 - Weight: One point for each match
 - Minimum zero points, max equals the total number of selections

NOTES

- It is possible that there aren't any mentors who match every criteria.
 - Sometimes the best matches may be in the right location, and speak the preferred language(s) but only have one matching Industry or Area of Expertise.
 - The more matches there are, the higher the point value and the higher they will appear in the results.
- It is possible that there aren't any mentors who match any criteria
 - If there are no mentors in a location (not likely to happen)
 - If there are no mentors in a location that speak the preferred language

How to Conduct a Mentor Match Search

1. **Select your location:** Choose a location from the list of chapters or select all locations to search the full database of mentors. If a location has already been selected in the menu, the Matchmaker will default to that choice.
2. **Select your preferred meeting type.** Choose your preferred meeting type from the available options: In Person, Email, Video, or Phone. You can select multiple options from this list.
3. **Choose your preferred language.** Select your preferred language from the list of languages provided. More than one language may be selected.
4. **Choose the areas of expertise you are interested in.** Select the areas of expertise you are interested in. More than one area of expertise can be selected.
5. **Choose the industry (or industries) you do business in.** Select the industries relevant to your business. More than one industry may be selected.
6. **Click on the "See My Matches" button.** Once you have entered all the required information, click on the "See My Matches" button to execute your search.

7. **Review the list of matched mentors.** The system will use an algorithm to determine the closest matches based on your criteria. The mentors that match your criteria will be displayed in a list format.
8. **Review each mentor's information.** Each mentor's information will be displayed in a card format on the left-hand side. The mentor's picture, name, location, and brief bio will be provided. On the right-hand side, you will see a list of the mentor's meeting preferences, languages, expertise and experience. Review each mentor's information and select the "View Profile" button to see more information about the mentor.
9. **Try the advanced mentor search.** If you did not find the mentor you were looking for, there is an option below the mentor search with the heading, 'Looking for something specific?'. Click on the button "search for a mentor". This will take you to the advanced mentor search, which will allow you to search for mentors based on additional criteria.



Mentor Matchmaker

Ready to find the perfect mentor for your business goals? Simply answer a few questions and review the matching mentor profiles to find your ideal business mentor.

Set your search preferences to find a good match. You can also search by keyword below or use our [LiveChat feature](#) to chat with a SCORE representative about finding a mentor.

Select a location *

Select a location, or use "All Locations" to search nationwide.

- All locations -

How would you like to meet with your mentor? *

Select at least one meeting type. If In Person is selected, a specific location must be selected.

Email Phone Video

What is your preferred language? *

Select at least one language. Mentors in the results will match at least one of the selected languages.

English

In what areas are you looking for mentoring? *

Select at least one area of expertise. We'll try, but results may not always be an exact match.

- Select -

In what industry or industries do you do business? *

Select at least one industry. We'll try, but results may not always be an exact match.

- Select -

[SEE MY MATCHES](#)

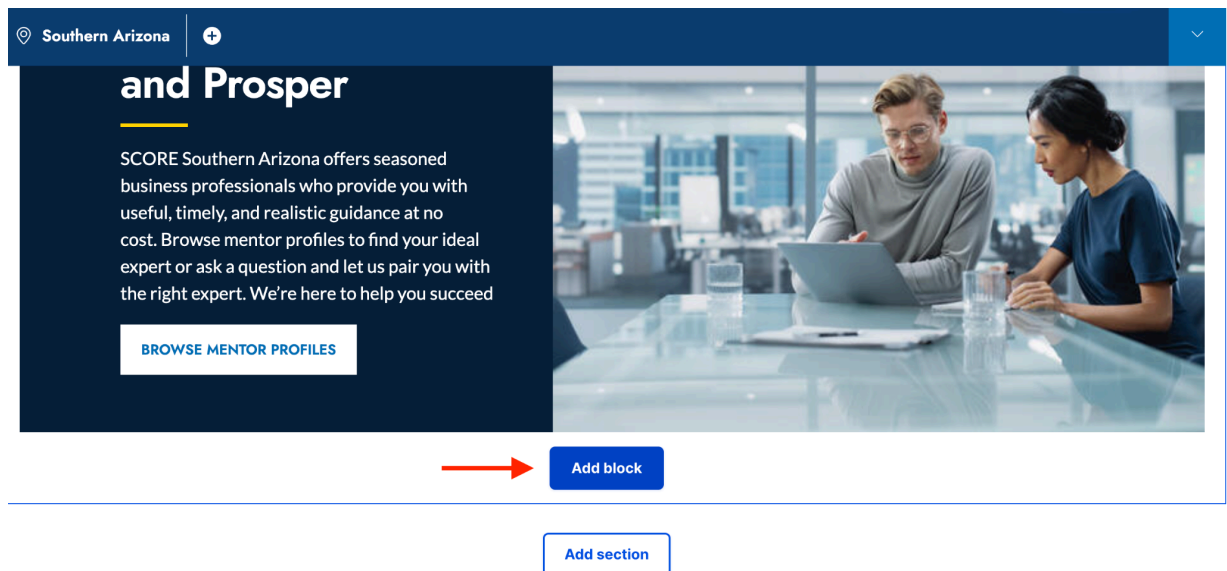
Looking for something specific?

Search our mentor database to find the expertise you need.

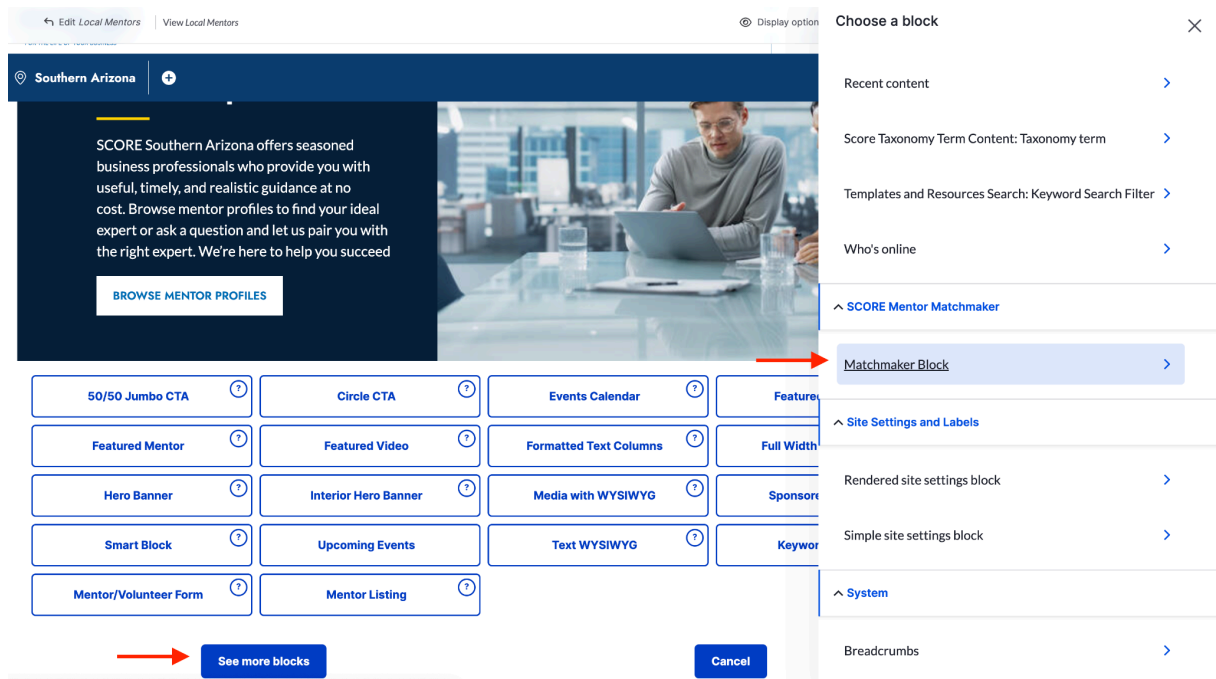
[SEARCH FOR A MENTOR](#)

How to Add the Matchmaker Block to Your Chapter Website

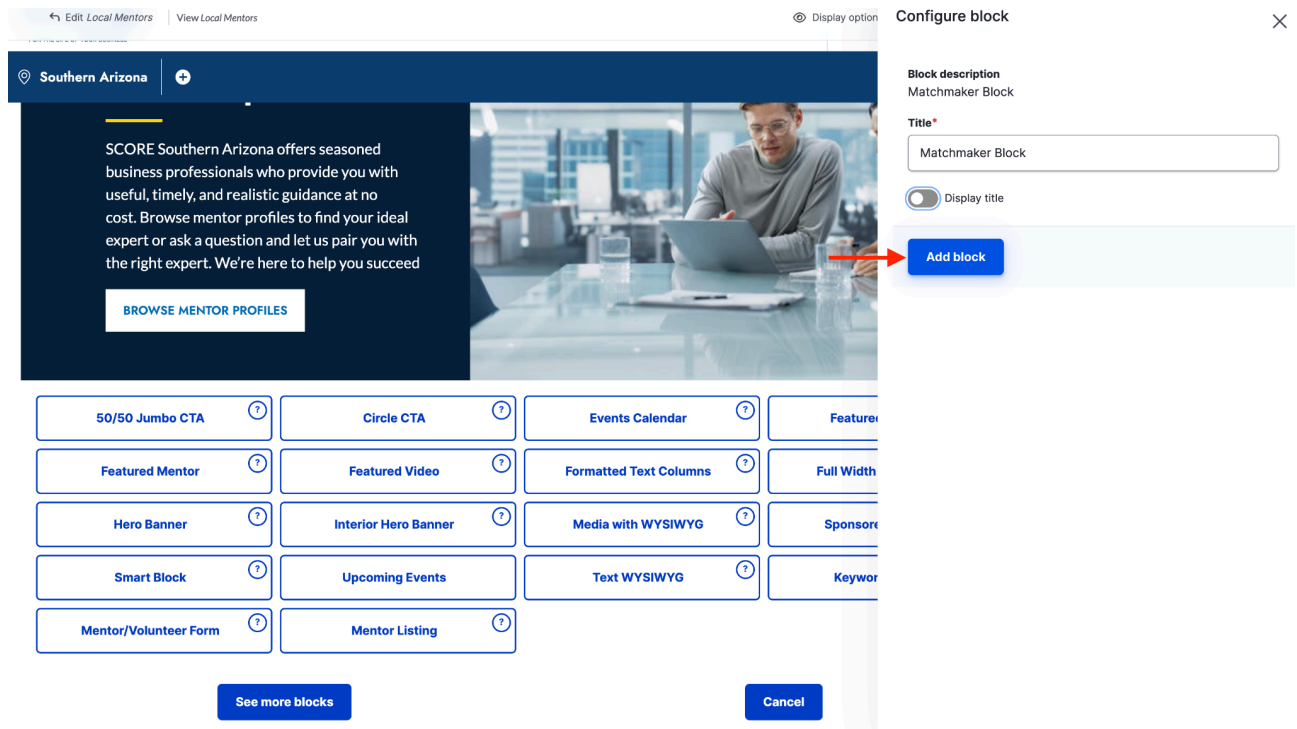
- Create or edit an existing page (It can only be added to the Page content type).
- Click on Layout to enter Layout Builder
- Select the section you want it located in and click “Add Block”.



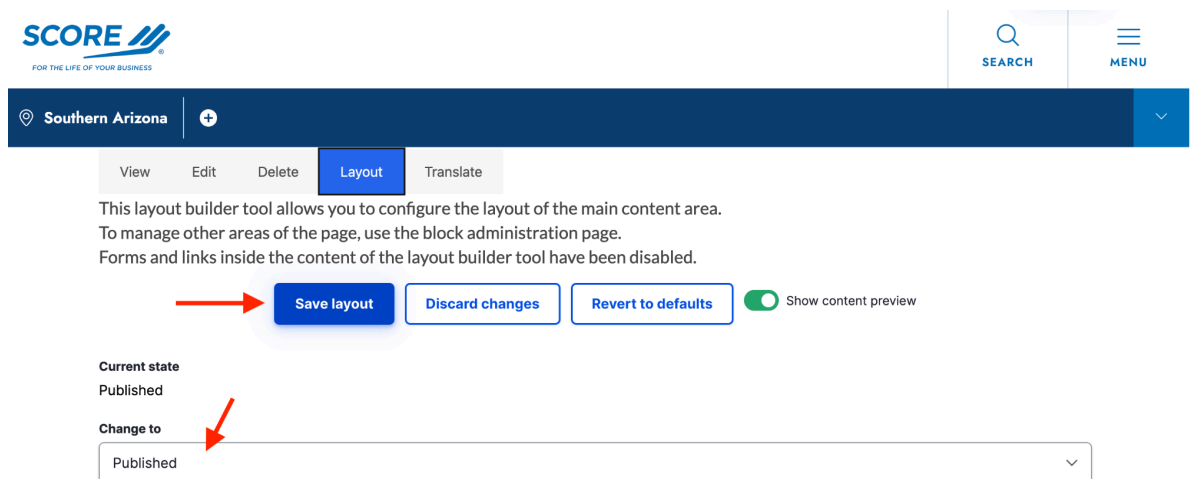
- Click “See more blocks” to view the full list.



- In the 'Choose a Block' Menu there are 2 ways to access the block:
 - Using the search bar under the 'Create Custom Block', type in 'Matchmaker Block'.
- OR:
- Scroll down to the 'SCORE Mentor Matchmaker' section and select 'Matchmaker Block'.
- Select the block, add a title, and click the 'Add Block' Button. (You can choose whether to 'Display title' or not.)



- Once you are brought back to the 'Layout Builder' page, hit 'Save Layout' to save the changes. (Make sure your page is set to "published")



- You should now see the 'Matchmaker' block on the page.

Frequently Asked Questions About the Mentor Matchmaker

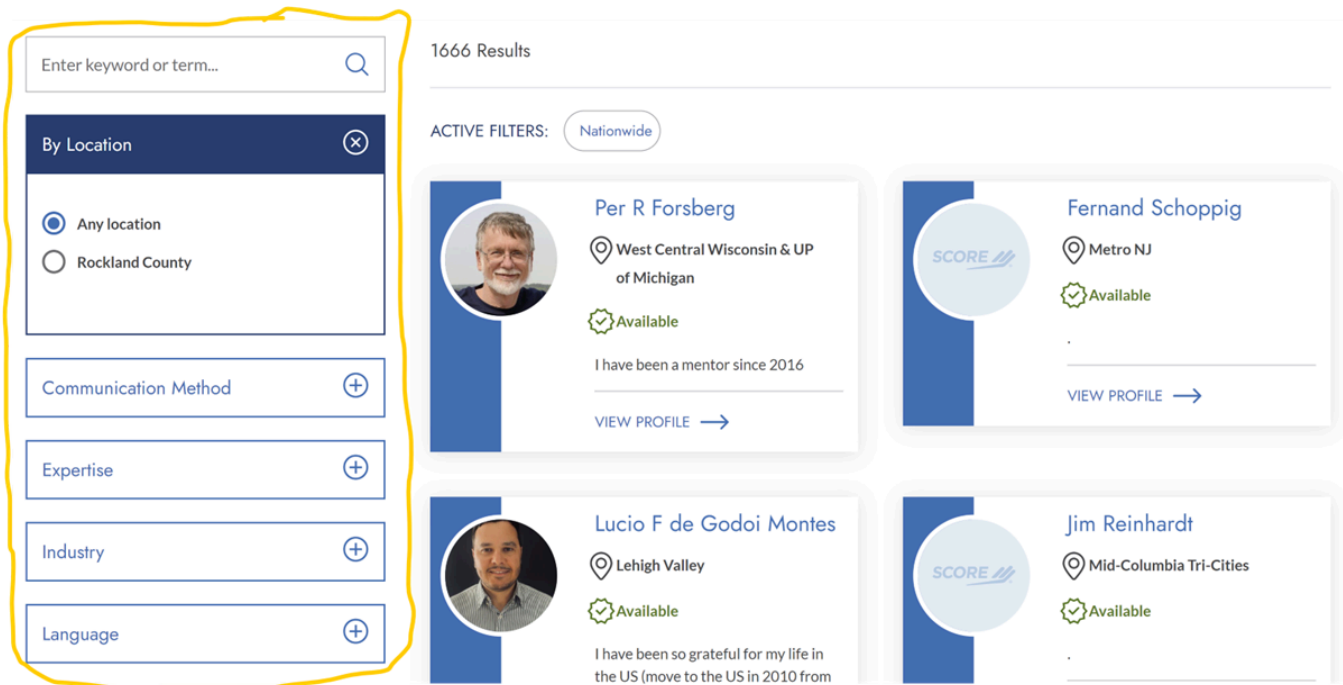
I. Are you forcing mentors to accept direct requests as part of this new feature?

No. We are not changing anything about a mentor's ability to accept (or not accept) direct requests.

The Mentor Matchmaker is a reimagined mentor search that combines the existing search ability with the “Our Mentors” block that almost every chapter has on their website.

What do I mean by that?

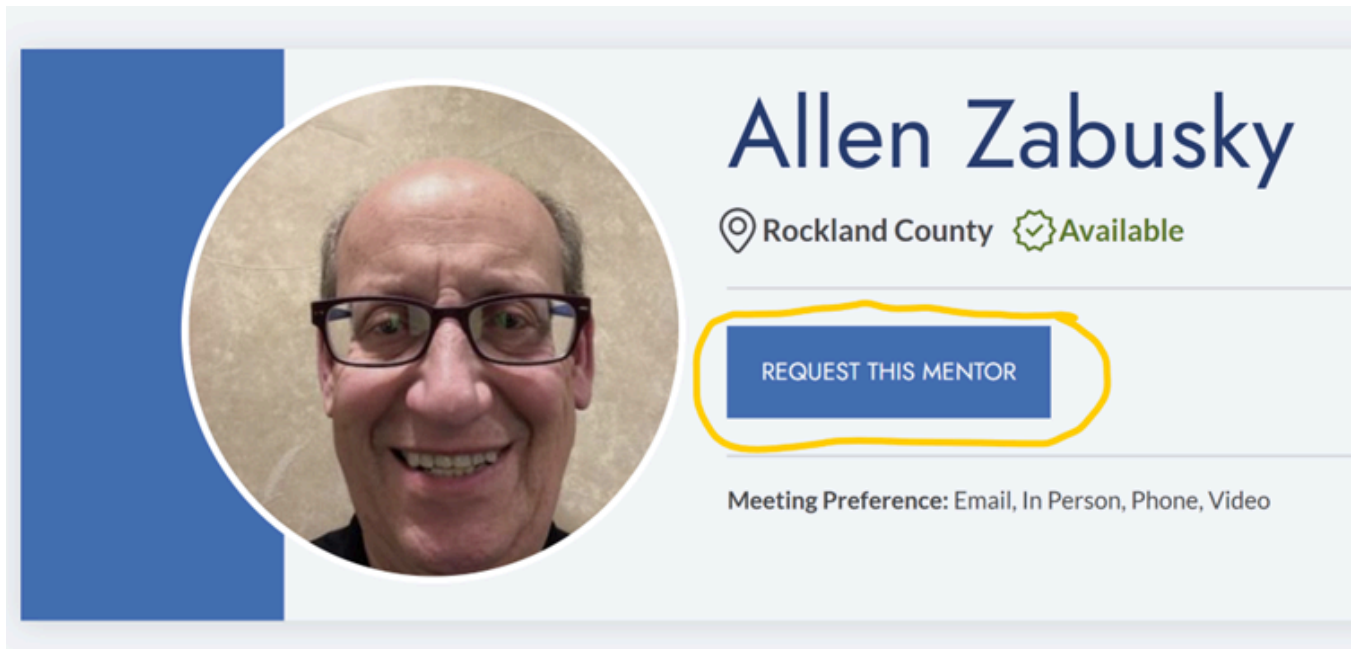
- a) The existing mentor search function allows clients to enter a keyword and/or apply search filters to find their ideal mentor.



The current search function only displays mentors who are available and accepting direct requests. Because we have several chapters that prefer to route all requests through the client intake coordinator (CIC), the current search experience is broken, with certain markets (such as [Rockland County](#) – 3 mentors accepting direct requests, [Boston](#), and [Twin Cities](#)) displaying 0 or very few mentors in the search results. This leads clients to believe that there are no mentors in those markets, even though there are many.

- b) The “Our Mentors” block was created years ago for chapters that wanted the ability to display all of the mentors in their chapters regardless of their availability or willingness to accept direct

requests. This gives local webmasters to showcase all of the expertise available locally. See an example of the Our Mentors block on the Rockland County Local Mentors page here: <https://www.score.org/rockland/local-mentors> – 16 active mentors displayed. Clients can request mentors from this page. If they are accepting direct requests, the button on their profile says, “Request This Mentor”. The mentoring request form appears, and it contains the mentor’s name, meaning that it will be sent directly to the mentor.



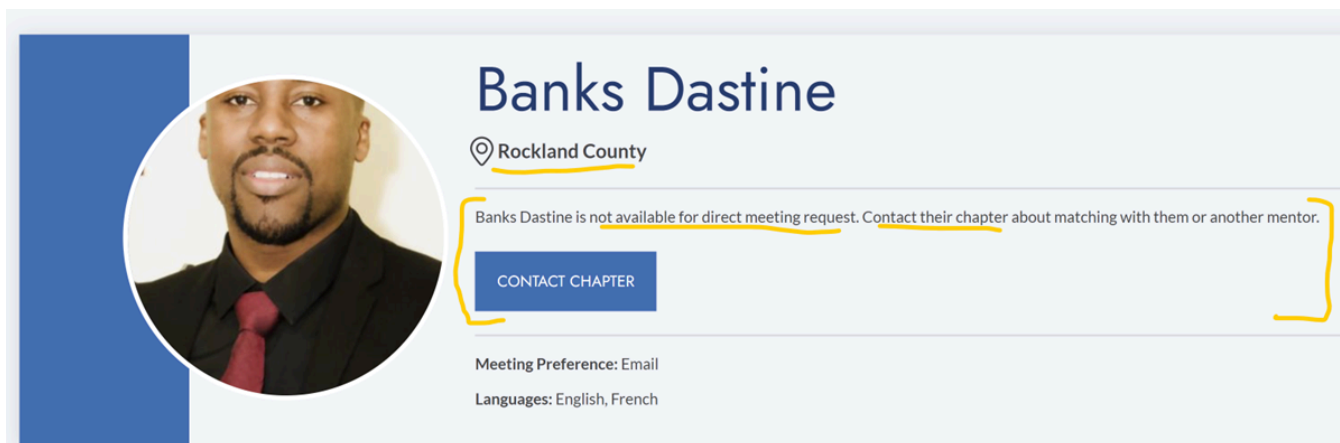
Mentor Request Form

Please fill out the form below so that we can pair you with the best mentor to help you with your business.

By submitting a request, you agree to SCORE's website policy.

Your request will be sent to

Alternatively, if the mentor is NOT accepting direct requests, the button on the profile says “contact this chapter”. The mentoring request form appears and it displays the chapter name, meaning the request will be sent to the CIC.



Banks Dastine
 Rockland County

Banks Dastine is not available for direct meeting request. Contact their chapter about matching with them or another mentor.

CONTACT CHAPTER

Meeting Preference: Email
 Languages: English, French

Mentor Request Form

Please fill out the form below so that we can pair you with the best mentor to help you with your business.

By submitting a request, you agree to SCORE's website policy.

Your request will be sent to

- c) **The Mentor Matchmaker combines the functionality of these two features.** The Matchmaker allows clients to use the same search filters that are visible on the mentor search, and it displays all active mentor profiles regardless of whether or not they're accepting direct requests. If a client selects a mentor who is NOT accepting direct requests, they'll see the button that says, "Contact This Chapter," and the request will go to the CIC. The CIC will use the origination information on the mentoring request to see where the request came from (in this case, a specific mentor profile). *You can see this in the [website webinar](#) at 01:20:28.*

2. If I uncheck 'Serve Clients Outside of Local Area' in Engage, will my profile still show up in the Mentor Matchmaker?

That checkbox has no impact on the website. In other words, if you uncheck "Serve Clients Outside of Local Area" in Engage, your profile will appear for all users who use the Matchmaker and enter information that matches your profile.

3. How can the local CIC see their mentors' direct requests (a), and what happens when that mentor is not accepting direct requests? How can the CIC determine which mentor the client requested? (b)

- There is a report in Engage that provides this information. This was covered in the [February website webinar](#) starting at 00:26:10.
- In the mentoring request, there is an origination field that provides the page that the client was on when they submitted the mentoring request. In this case, if the client requested a mentor who is not accepting direct requests, the origination field would display <https://www.score.org/centralvalley/profile/firstname-lastname>. You can see this displayed in [this month's website webinar](#) starting at 01:10:54.

4. If I am a user in Boston and I select a Mentor who is in Los Angeles and that Mentor does not take direct requests, which CIC receives the Mentoring Request for assignment?

If you are a user in Boston and you select a mentor in LA who is not accepting direct requests, the LA CIC will receive the mentoring request. This is based on the message and the call-to-action button that appears on the mentor's profile that states that the desired mentor is not accepting direct requests and to contact that chapter to be paired with that mentor or another mentor.

Please note: The only condition under which this would occur is if the Boston user selected "All Locations" instead of Boston in the Matchmaker search. This means the client would have to expressly select to search nationwide for a mentor instead of searching for a Boston mentor.

If they had previously identified Boston as their chapter so that the Boston chapter is in the menu, the Matchmaker pre-populates with Boston as the desired location for the Matchmaker search. The client would have to de-select Boston and select "All Locations" to search nationwide.

Please see the screenshots below.

The screenshot shows the SCORE Matchmaker search interface. At the top, a blue navigation bar contains the 'Boston' location selected, along with links for 'Find a Local Mentor', 'Local Workshops', 'Local Resources', 'Local Clients', and 'About'. Below the navigation bar, a message states: 'Set your search preferences to find a good match. You can also search by keyword below or use our [LiveChat feature](#) to chat with a SCORE representative about finding a mentor.' The main search area is divided into two sections. The left section, titled 'Select a location *', contains a dropdown menu with 'Boston' selected. The right section, titled 'How would you like to meet with your mentor? *', contains a dropdown menu with 'Email', 'Phone', and 'Video' as options. A note below the right dropdown states: 'Select at least one meeting type. If In Person is selected, a specific location must be selected.'

OR

 Boston  Find a Local Mentor Local Workshops Local Resources Local Clients About

Set your search preferences to find a good match. You can also search by keyword below or use our [LiveChat feature](#) to chat with a SCORE representative about finding a mentor.

Select a location *

Select a location, or use "All Locations" to search nationwide.

- All locations - **A user would have to manually select this**

How would you like to meet with your mentor? *

Select at least one meeting type. If In Person is selected, a specific location must be selected.

Video

Profile of a mentor who is not accepting direct requests:



John Marias

 Los Angeles

John Marias is not available for direct meeting request. [Contact their chapter about matching with them or another mentor.](#)

CONTACT CHAPTER

Meeting Preference: In Person
Languages: English

Mentor Request Form

Please fill out the form below so that we can pair you with the best mentor to help you with your business.

By submitting a request, you agree to SCORE's website policy.

Your request will be sent to

Los Angeles