MATCHING / INITIAL INTERACTION

Matching is consistently cited as one of the most critical elements that ultimately leads to the success or failure of mentoring. Mentors and mentees, however capable on their own, will not succeed if misaligned.[42] Some of the issues underpinning matching must be worked through between the two parties, but several can be identified in advance or in the first interaction by the program staff. Best practice when it comes to matching and initial interactions, includes:

1 Match participants before the initial interaction based on key factors

Key factors include:

- **Alignment of values and interests:** One of the most crucial barriers to effective mentoring is a mismatch in the values of mentor and mentee. A meta-analysis of mentoring programs confirmed the importance of mentors and mentees being paired based on similarity of interests.[43] There are important cultural elements to consider, especially when matching across regions.

- **Alignment of expectations and goals of relationship:** Researcher Dr. Douglas recommends mentors outlining and discussing the aims of the program with mentees at the beginning of the program.[44] Both parties should want the same long-term outcomes of a relationship based on trust, empowerment, and mutual learning.

- **Alignment on time commitment expectations:** Both parties should be aligned in their expectations on the time commitment required for the relationship. Mentoring that is too light touch often does not end up adding value for either party. According to one interview: "There is always this little dance of 'how often should we connect or how aggressively to chase. How much should I chase the mentor…what if I have an urgent need, etc.'."[45]

- **Balanced gap of experience and context:** MSMEs mentors are often most effective if they are one or two stages further along their business journey than the mentee or are higher performers. They will have a greater understanding of the problems faced by the mentee and the options available to them.

- **Balanced personalities and ego:** If the ego of either the mentor or mentee is too strong, the relationship likely will not work. If the mentor has high ego levels, they will be unlikely to act as an empowering resource to the mentee. If the entrepreneur has a high level of ego, they will be unlikely to be open to receiving feedback.[46] Beyond ego, inaccurate matching by personality and professional expertise can cause tension. Respect for the mentor and quality of communication are key to effectiveness.[47]

2 Ensure understanding of cultural context and other elements of identity

Local vs. non-local mentors

It is recommended that the mentor has a thorough understanding of the economic, political, and cultural context the mentee operates within, in order to provide the right type of advice.[48] Research varies on whether or not local mentors should be prioritized over non-local mentors.

Many interviewees feel that when possible, local mentors may give an edge to the experience by understanding local markets and the best guidance to offer within that context.[49] The same is true when it comes to extending

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[42] Guttentag; Salas; Vargas, 2020, [43] DuBois et al., 2011, [44] Douglas, 1997, [45] Holzman, 2020, [46] Bury, 2020, [47] Finkelstein et al., 2012, [48] Holzman, 2020, [49] Holzman, 2020

network support.[50] Whether local knowledge is needed in a mentoring exchange is an important distinction to be aware of in developing country settings, as on the ground realities shift regularly due to a variety of political, economic and social factors.[51]

In one mentoring program in Uganda, local entrepreneurs worked with both in-country and international mentors. In this instance, local mentors were successful in helping the businesses to make incremental gains, navigating local markets. The international mentors were successful in recommending fundamental business pivots, and looking beyond the context of the local market.

Non-local mentoring has other proven successes as well. For MicroMentor, 40% of mentoring relationships are cross-border. They have found that many of the challenges faced by entrepreneurs are universal enough that non-local mentors can still provide value.[52]

Gender and language dynamics between mentors and mentees

Gender dynamics are an important element that should be considered when matching. If the mentee is uncomfortable with the mentor, or vice versa, the relationship will unsuccessful. This is particularly true for women entrepreneurs paired with male mentors.[53]

Furthermore, mentors should be able to bridge ethno-linguistic differences sincerely and easily. Being able to communicate conversationally in the most comfortable language of the mentee ensures openness and comfort when building the relationship.[54]

3 Establish and communicate opportunities to assess chemistry and check match early on

Even with the most effective program planning and profiles matched on paper, it is important to match mentors with MSMEs based on real-time fit and connection, which can change over time. Where possible, it is recommended that mentor-mentee connection and fit is assessed prior to continuing a weeks- or months-long relationship together.

There is a high risk of failure if the mentee is uncomfortable with the mentor (or the other way around), and they still pursue a relationship. The matching process is a natural point at which to communicate to both parties that the match is flexible, and that it is appropriate for either to communicate fit or no fit.

Speed mentoring opportunities allow mentors and mentees to check potential matches with one another and share thoughts on fit.[55] The Universidad Catolica de Chile, for example, used a series of proxy questions in a speed-mentoring format in order to match entrepreneurs for mentorship. This helped them to improve the success rate of their pairings.[56]

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[50] Holzman, 2020, [51] Guttentag, 2019, [52] Ramachandran, 2020, [53] Holzman, 2020; Morris, 2020; Vargas, 2020, [54] Artiga, 2020; Ramachandran, 2020, [55] Artiga; Bury; Holzman; Morris; Ramachandran; Vargas, 2020, [56] Vargas, 2020