

UX Mentoring at Scale: A How-to Guide

Published in *UXPA Magazine*, December 2018

Bob Thomas, Director of User Research, Liberty Mutual

Jen McGinn, Senior Director of User Experience, Veracode

Introduction

We have mentored dozens of UX practitioners and grad students over the years, and we have found that what most mentees are looking for is coaching or advice. The questions they have fall into categories such as “Do I need a degree in UX?”, “What classes should I take?”, “How can I get my first UX job?”, “Should I be a generalist or a specialist?”, and “Should I move into management?” These kinds of questions can often be answered in one or two meetings, and then the mentees are off and running.

Traditional mentoring programs have a lot of value. But finding the mentors can be difficult, and then pairing them one-by-one with mentees can be time consuming. Because the recruiting and matching processes are such a heavy lift, the number of mentees who can be paired with mentors is always limited to the maximum number of mentors. Many potential mentees are left without mentors.

In this article you will learn about:

- How we created rapid group mentoring activities
- How we organize the mentoring activities so mentees and mentors get the most out of the time they have together
- All the details of logistics and recruiting, so you can organize a similar activity in your UX community

Mentoring at UX Conferences

Since 2013, we have organized group mentoring sessions at the annual UXPA Boston Conference, which typically takes place in May of each year, as well as the UX Fair, which typically takes place in November to coincide with World Usability Day. Each conference has a different purpose and is geared toward different audiences. The UXPA Boston Conference is an annual, one-day conference that attracts a variety of people across disciplines: newcomers to our field and experienced practitioners, as well as the distinguished professionals who have been defining and shaping the field of user experience for decades. The UX Fair is an annual, one-day career development and mentoring fair for students and career changers who are interested in breaking into the field of user experience.

We have conducted some one-on-one mentoring events, pairing mentors and mentees for one-on-one sessions. The upside is that it allows for a personalized meeting between an experienced professional (the mentor) and the mentee. But the downsides with this approach involve sign-ups and scheduling in advance; sending reminders to both parties; and rescheduling if mentors or mentees do not show up or cancel. It can work, but it also can be a logistical headache. You also run the risk of pairing the wrong mentor with a mentee.

Group Mentoring

Instead of individual, one-on-one sessions with mentors and mentees, we schedule Group Mentoring tables at UXPA Boston's two annual conferences. At the all-day UXPA Boston Conference, we run two Group Mentoring sessions, one in the morning, one in the afternoon in parallel with other conference sessions. At the all-afternoon UX Fair, we run at least one Group Mentoring session each year; in 2017, we ran two. Each Group Mentoring session lasts an hour.

We really stumbled on this approach, and it took a little trial and error to get it right. In 2012, the first mentoring activity at the UXPA Boston conference was very unstructured. We recruited mentors (mostly people we knew) and asked them to show up for mentoring at a specific time. We had no idea who or how many mentees would show up. The response was overwhelming, and we had far more people looking for mentoring than we had mentors. While some mentors paired up with a single mentee, three groups organically formed, making a circle of chairs to include one or two mentors and several mentees. What we observed was that (a) many mentees had the same questions and (b) mentees said they got a lot out of hearing other peoples' questions and the mentors' answers to them. Ta da! Group mentoring was born.

The next year, we scheduled a room with round tables, like you see in Figure 1, and tried to organize mentees (and mentors) into groups of people who either identified as "User Researchers" or "Designers," but there were people who showed up who were not in the UX field, as well as people who were working independently. The following year, we tried categorizing the mentoring tables by something like "Independent," "New to UX," and "UX Practitioners." We had almost no independent practitioners and more demand for "New to UX" than we could meet.



Figure 1. Group Mentoring Tables, UX Fair

So, for the last four years, we have focused on mentoring people in two categories, which has worked really well. The first category is made up of people who are new to UX, and this is where we see most of the demand. The second category is UX professionals who are interested in career development. The “New to UX or Career Changers” category includes students and professionals working in other fields who are interested in getting their first job in user experience design, research, information architecture, or content strategy. The “Career Development” category focuses on UX professionals already working in the field, who are looking for advice on how to get buy-in for their work, how to engage stakeholders, or how to get a promotion to the next level. We see both individual contributors and managers attend these sessions. The categories work well for two reasons. First, it is pretty easy for mentees to select one category or the other. And second, we see the types of questions that people ask are more related to where they are in their UX career than what particular type of role they have.

How the Group Mentoring Sessions Work

When the mentees arrive, we ask them what kind of advice they are looking for and then they are given color-coded index cards – one color for the “New to UX” folks, (like the one shown in Figure 2) and another color for the “Career Development” folks. When they are given the card, they are directed to a table that has a sign on it, indicating the type of mentoring they are looking for. The mentees are asked to complete the cards as soon as they sit at the table. On one side of the card, there is a place for mentees to write three things: First Name, Current Role, and One question [they] would like answered today.

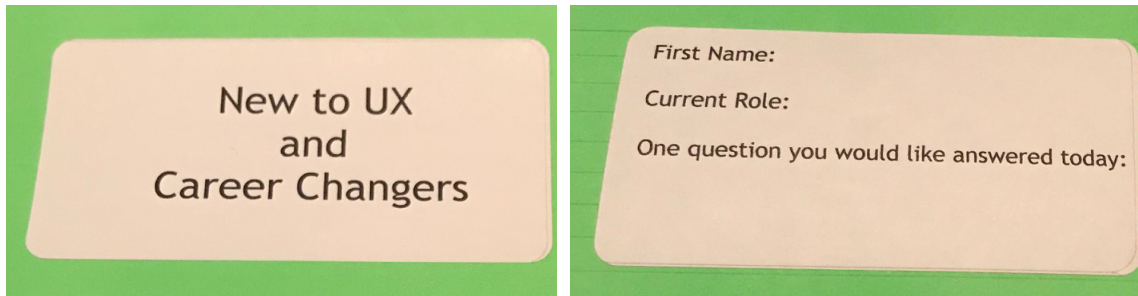


Figure 2. Front and back of labeled index cards for mentees to complete

The cards serve three purposes – first, all mentees should have the same color card, which indicates what kind of mentoring they are looking for, so mentors can quickly see if anyone is at the wrong table. Second, it gives the mentee something to do while their table is filling up. But third, and most importantly, it allows mentees to crisply identify what they want to ask, so they are able to make the most efficient use of the group’s very limited time.

Once the table is full (2 mentors and around 8 mentees), each mentor spends about 30 seconds introducing themselves: first name, current role, degree(s), and years in the UX field. Then, each of the mentees spends 30 seconds reading what they have written on the cards. It gives mentors an overview of who they are talking to, what their questions are, and in what order they want to answer them. We find there are always multiple people with the same question, so we recommend mentors start with those first. Both mentors then contribute their thoughts on each question but can alternate who goes first. Once mentors think they have answered all of the questions, they ask the mentees if they have answered everyone’s question. If so, they ask for other questions.

Typical questions that mentees new to the field ask include:

- How do I break into the UX field?
- How can I get into a UX role at my current company?
- What skills are hiring managers looking for?
- Do I need a master’s degree? Certification?
- Do I need a portfolio? If so, how do I set it up? What do I put in it?
- I want to be a designer. Do I need to know how to code?

Recruiting Mentors

We have recruited mentors over the years through networking, usually on LinkedIn, Facebook, and Twitter – but also through face-to-face interactions by reaching out to colleagues, former classmates at alumni reunions, or chatting people up at conferences. We tag UX friends on Facebook and send emails directly to individuals. That approach is effective at recruiting people who have mentored before and who would like to mentor again.

The other approach we use, which is effective at recruiting new mentors, is setting up online surveys in Wufoo (like the one in Figure 4) and sending out email blasts to our UXPA Boston membership using MailChimp (shown in Figure 3). Both approaches are necessary because we need experienced mentors as well as new mentors.

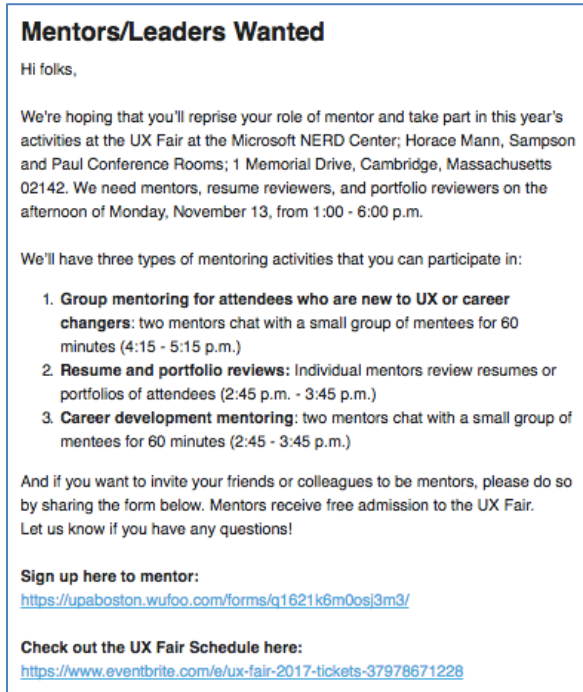


Figure 3. An email blast from UXPA Boston

2017- UX Fair: Mentors, Portfolio/Resume Reviewers

Sign up below to help! Review the [UX Fair schedule](#) before making your decision. As a volunteer mentor or resume/portfolio reviewer, you may be asked to participate in a planning call prior to the conference.

After you sign up, we will email you the code to register for the UX Fair for free. The UX Fair is Monday, November 13, 2017, from 1:00 - 6:00 p.m.

Name *

First Last

Email *

Current Job Title/Role *

Company/Affiliation

I want to help. Please check all that apply. *

- Mentor People New to UX or Career Changers
- Mentor UXers about Career Development
- Review Portfolios
- Review Resumes

When are you available? Please check all that apply. *

- Group Mentoring, 4:15 - 5:15 p.m.
- Career Development, 2:45 - 3:45 p.m.
- Portfolio Reviews, 2:45 - 3:45 p.m.
- Resume Reviews, 2:45 - 3:45 p.m.

My first choice is:

Group Mentoring

Relevant Background/Experience *

Figure 4. A mentor survey sign-up form

Recruiting and Advertising through Social Media

We have used a MailChimp-generated newsletter, as well as Facebook and Twitter posts, to recruit mentors and to advertise mentoring events and conferences.

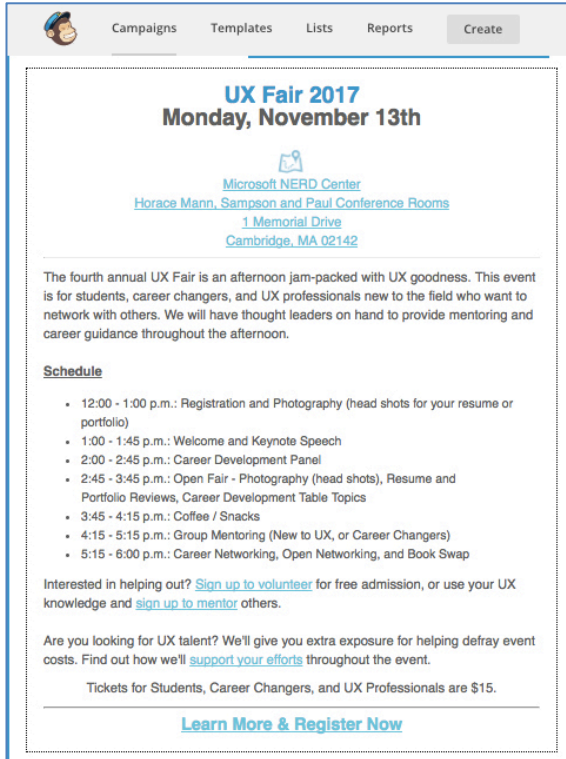


Figure 5. Mailchimp Newsletter



Figure 6. Facebook post



Figure 7. Twitter post

Numbers of Mentors to Recruit, and Number of Mentees to Prepare for

The UXPA Boston Conference has been averaging 925-1,026 attendees the last four years (2015-2018). We plan for 50-60 attendees at each Group Mentoring session. Even though there are 4-5 other conference sessions going on at the same time, our mentoring sessions are popular for those attendees who are new to UX or seeking a new career in UX. With 50-60 attendees, we need to organize 8 tables, of which 5-6 are for “New to UX and Career Changers”, and 2-3 of which are for “Career Development”. We staff 2 mentors at each table, assuming that they will be seated with 5-10 mentees. We typically recruit 16-20 mentors for 50-60 mentees. We also schedule alternate mentors in case some of the mentors cannot make it. When mentors cannot make it, it is usually because of an illness, and they email us to profusely apologize for missing out on the experience.

The UX Fair has been averaging 100 attendees the last few years (2015-2017). We plan for 70-80 attendees at a Group Mentoring session. No other sessions are going on at the same time. That means we need to organize 10 tables, of which 7-8 are for “New to UX and Career Changers”, and 2-3 are for “Career Development”. Consistent with the UXPA Boston Conference, we staff 2 mentors at each table, assuming that they will be seated with 5-10 mentees. For this conference, we recruit 20-24

mentors, which includes 3-4 alternates to replace mentors who may need to cancel at the last minute.

Pairing Mentors

After we recruit the mentors, we need to ensure that we have enough mentors in the right timeslots for the right topics, so every table is staffed. We try to pair a more experienced mentor with a less experienced one, and also try to pair one female and one male mentor at each table to ensure that the mentees get different perspectives on their questions. To pair mentors, we first export the “call for mentors” survey data from Wufoo-completed forms. Once we have paired the mentors, we email them to let them know who they will be working with and to give them guidelines on how to run the sessions. This advance notice gives the mentors the time to ask any questions they have, as well as (occasionally) ask to be paired with another

| Entry Id | PAIRING | Name | Last | Email | Current Job Title/Role | Company/Affiliation | I want to help. Please check all that apply. | I want to help. Please check all that apply. |
|----------|---------|------|------|-------|------------------------|---------------------|--|--|
| 25 | A | | | | | | Mentor People New to UX or Career Changers | Mentor UXers about Career Development |
| 23 | B | | | | | | Mentor People New to UX or Career Changers | Mentor UXers about Career Development |
| 10 | B | | | | | | Mentor People New to UX or Career Changers | Mentor UXers about Career Development |
| 1 | C | | | | | | Mentor People New to UX or Career Changers | Mentor UXers about Career Development |
| 22 | C | | | | | | Mentor People New to UX or Career Changers | Mentor UXers about Career Development |
| 27 | D | | | | | | Mentor People New to UX or Career Changers | Mentor UXers about Career Development |
| 13 | D | | | | | | Mentor People New to UX or Career Changers | Mentor UXers about Career Development |
| 29 | E | | | | | | Mentor People New to UX or Career Changers | Mentor UXers about Career Development |
| 3 | E | | | | | | Mentor People New to UX or Career Changers | Mentor UXers about Career Development |
| 26 | F | | | | | | Mentor People New to UX or Career Changers | Mentor UXers about Career Development |
| 7 | F | | | | | | Mentor People New to UX or Career Changers | Mentor UXers about Career Development |
| 4 | G | | | | | | Mentor People New to UX or Career Changers | Mentor UXers about Career Development |
| 18 | G | | | | | | Mentor People New to UX or Career Changers | Mentor UXers about Career Development |
| 30 | H | | | | | | Mentor People New to UX or Career Changers | Mentor UXers about Career Development |
| 15 | H | | | | | | Mentor People New to UX or Career Changers | Mentor UXers about Career Development |
| 14 | I | | | | | | Mentor People New to UX or Career Changers | Mentor UXers about Career Development |
| 8 | I | | | | | | Mentor People New to UX or Career Changers | Mentor UXers about Career Development |
| 12 | XX | | | | | | Mentor People New to UX or Career Changers | Mentor UXers about Career Development |
| 6 | XX | | | | | | Mentor People New to UX or Career Changers | Mentor UXers about Career Development |
| 9 | YY | | | | | | Mentor People New to UX or Career Changers | Mentor UXers about Career Development |
| 16 | YY | | | | | | Mentor People New to UX or Career Changers | Mentor UXers about Career Development |
| 20 | ZZ | | | | | | Mentor People New to UX or Career Changers | Mentor UXers about Career Development |
| 24 | ZZ | | | | | | Mentor People New to UX or Career Changers | Mentor UXers about Career Development |
| 11 | back-up | | | | | | Mentor People New to UX or Career Changers | Mentor UXers about Career Development |
| 19 | back-up | | | | | | Mentor People New to UX or Career Changers | Mentor UXers about Career Development |

mentor.

Figure 8. Exported survey data from Wufoo-completed forms that we use to pair mentors

Preparing for and Facilitating at the Group Mentoring Sessions

Seating

As discussed earlier, we like having mentors and mentees meet in a circle, so we book rooms with round banquet tables that can each seat 10-12 people. But any arrangement that allows all the participants to see and hear each other could work.

Materials

We use table stands and laminated 8 ½” x 11” signs to identify the mentoring topics at each table.

Index Cards

We pre-label two different color-coded index cards, “New to UX and Career Changers” on green cards, and “Career Development” on yellow. You do not have to use labels, but it saves a huge amount of time and effort on your part. On the back of the cards, we have our mentees fill out their First Name, Current Role, and One question they would like answered today. It helps to break the ice and organize the discussion.

Volunteers to Assist Participants to the Right Table

We recruit 2-4 volunteers/facilitators at each session to ensure that the mentees – and the mentors – know which tables to go to. In most cases, mentees will flock to a “New to UX / Career Changers” table. But some may need to be directed to a “Career Development” table.



Figure 9. Use table stands and laminated signs to identify mentoring topics at each table

Getting Feedback: Following Up the Group Mentoring Sessions

To help improve our group mentoring sessions, we ask our mentors to complete a short survey after the sessions are over, so we can fine-tune the activities over time. For example, when we first started running the sessions, some of our mentors told us that they did not know how to get the conversation started. The next time we ran the sessions, we included the index cards where mentees could write their First Name, Current Role, and One question [they] would like answered today.

Conclusion: The Benefits of Mentoring

In a good mentoring relationship, even one that lasts only 60 minutes, both people benefit. The person being mentored gains something that has a perceived value. The mentor has a chance to give back knowledge that they often did not know they had, or thought would be valuable to another person. We have heard from mentors that they attend these conferences just because they enjoy the mentoring so much. And we have received unsolicited feedback from mentees that the advice they have received at these events has changed their lives and careers.

One of the most important points about mentoring is that “perspective is additive.” We all have a unique way of thinking and we all have different experiences to draw

on. So as mentors it is upon us to add other people's perspectives into this big UX mix.

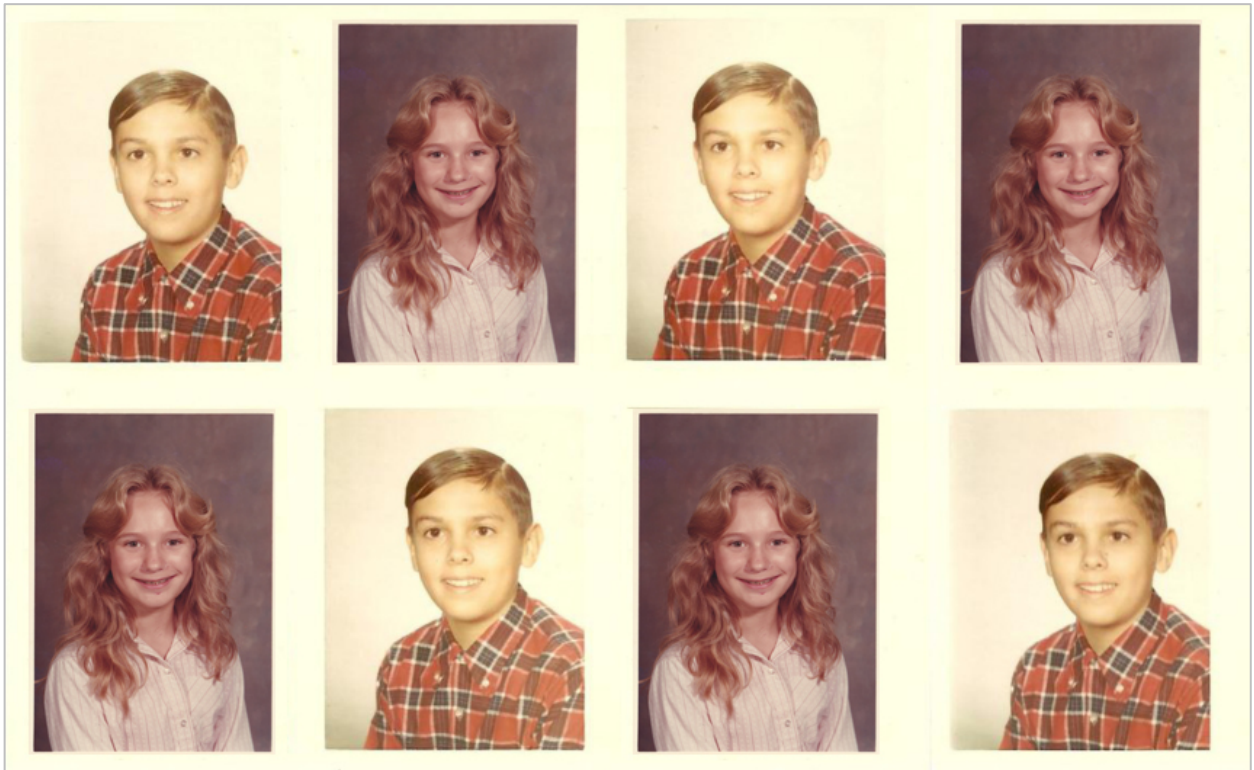


Figure 10. We cannot make carbon copies of ourselves

Because let's face it: we cannot make carbon copies of ourselves. As a UX community, we all benefit in celebrating differences. For example, in the field of usability research, some people want to try new methodologies, while others master tried and true methods. Through these mentoring programs, we are enabling both mentors and mentees to share their unique points of view with one another. This collective perspective creates better outcomes. Neither of *us* would be where we are today without our experiences as mentors and mentees.

About the Authors



Figure 10. The authors.

Bob Thomas is Director of User Research at Liberty Mutual Insurance. He is on the UXPA Boston Board of Directors, running Mentoring programs. Bob serves with Jen McGinn as Mentoring Co-Lead for UXPA Boston Conferences. He has an MBA in Marketing, and an MS in Human Factors in Information Design.

Jen McGinn is Senior Director of User Experience for CA | Veracode. She has mentored numerous students and UX professionals and helped establish the first mentoring program at Veracode. Jen serves with Bob Thomas as Mentoring Co-Lead for UXPA Boston Conferences. She has an MS in Human Factors in Information Design.