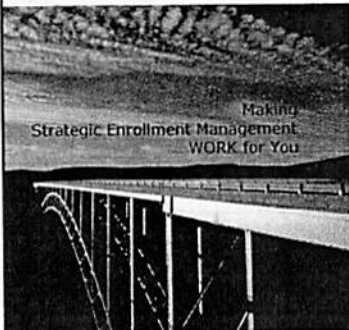


SEMWORKS



Making
Strategic Enrollment Management
WORK for You

**Representing Your
Institution at College
Fairs and Private
Visits**


Presented by
Ginger Marr

www.semworks.net

SEMWORKS

On The Road Again...
Developing Your Travel Schedule

- Travel assignments
 - Determine trip assignments with travel coordinator/other staff
 - Utilize a weekly calendar for easy viewing
 - Develop a monthly calendar for office use
- Determine what private visits are expected
 - Combine with college fairs
 - Use resources to determine priority visit locations
 - annual visit expectations, EPS, institutional data
- Map out itinerary
 - Consider driving time, distance between schools, time of day
 - Check with travel coordinator for viability of plan



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Want to do lunch?...
Scheduling Visits

- Responding to college fair invitations
 - Be prompt with reply
 - Consider professionalism in response
- Scheduling Private Visits
 - Call/e-mail early, check for school district schedules, holidays, etc.
 - Suggest date/times, but remember you are the guest!
 - Avoid lunch time cafeteria set up, if at all possible
- Get the Details
 - Confirm counselor name, phone, email address, school address
 - Record time and length of visit and any special set up arrangements
 - Obtain directions, parking information

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Let them know you're coming...

Communication Prior to a Visit

- Obtain lists of active prospects for each school or area you will be visiting (remember to check status)
- Mail postcard or letter or email students to let them know you will be in their school or hometown
- Send confirmation letter to counselor who will be hosting program or private visit
- Never drop in—always make appointments for private visits

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Do your homework!

Ensuring A Productive Visit

- Obtain lists of enrolled students from the area or school you will visit
- Become familiar with list of prospects from each school or area you will be visiting
- Learn as much as possible about the high schools you visit
 - Use EPS, other directories
 - View profiles of prospects from previous years
- Go prepared—update files/posters

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You're tough, but not invincible...

Travel Safety

- **Before You Leave**
 - Always use business address/phone when making arrangements and on luggage tags
 - Evaluate contents of wallet/purse, record contents, carry only necessities
- **Hotel Safety**
 - Consider safety when making hotel choices
 - Make group travel arrangements, carpool from hotel
 - Safe practices for hotel stays
- **Car Safety**
 - Educate yourself on traffic patterns/problems in a new city
 - Park at a convenience store or restaurant to ask for directions or assistance if you are lost or having car trouble
 - Consider access, security, lighting, etc. when parking in a parking garage
 - Rental car problems
 - Accidents
 - Speeding
 - (see Safety Tips handout for additional information)



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It's all up to you...

Representing Your Institution

www.boncomp3.net

- ✓ You ARE your institution
- ✓ Dress/Act professionally at all times
- ✓ Know your stuff!
- ✓ Be confident of answers to FAQ
- ✓ Keep catalog, other references handy if needed
- ✓ If you don't know an answer, promise (and deliver) requested information when you return
- ✓ Always be honest
- ✓ Learn to handle the difficult questions/people

I'm Here... Now What?

During College Fairs

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- ✓ Always follow Code of Ethics, Principles of Good Practice, program guidelines by host organization
- ✓ Never keep food or drinks in sight on the table
- ✓ Greet, smile, shake hands, be friendly and courteous
- ✓ Don't leave table unless absolutely necessary
- ✓ Always keep paper handy in case you run out of cards (never run out of cards!)
- ✓ Always stand "ready to greet" while students are present
- ✓ Stay at the program until the end (or at least until all students have left)
- ✓ Use down time or program breaks for prospect card coding, entering prospect cards on laptop

I'm Here... Now What?

At the Private Visit

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- ✓ Always arrive early... NEVER late
- ✓ Park in visitor parking... never in reserved spots
- ✓ If allowed, provide list of students to counselor for class dismissal during visit
- ✓ Personalize your presentation
- ✓ Discuss activities, newsmakers
- ✓ Make notes about students, capture additional prospect information, use institutional coding system
- ✓ Note any follow up needed
- ✓ Convey call to action
- ✓ Recognize the importance of the counselor
- ✓ Giveaways
- ✓ Updates on new activities/programs at your school
- ✓ Questions
- ✓ Thanks

*Been There... Done That!***Make your visit memorable**

- Follow up immediately with any students who requested additional information
- Send postcards, e-cards, e-mails, personal notes to prospects as determined by your recruitment plan
- Repeat call to action
- Thank counselor or program host

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*There's No Place Like Home...***Post-Travel Activities**

- Immediately enter prospects into computer system, begin follow-up correspondence plan
- Unpack unused materials
- Complete paperwork (reimbursements, etc.)
- Evaluate the programs/visits
- Contribute good notes, suggestions to travel file for future travelers' reference
- Look forward to future road trips!




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SEMIWORKS



Making Strategic Enrollment Management WORK for You

Developing Relationships with High School Guidance Counselors and Transfer Counselors

Presented by
Kacy A. Hodgkin

www.semiworks.net

SEMIWORKS

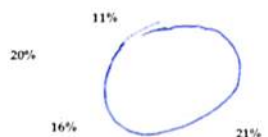
Role of the High School Counselor

- College Counseling
- Academic Advising & Course Selection
- Social, Psychological and Personal Counseling
- Administrative Duties
- Test Administrator

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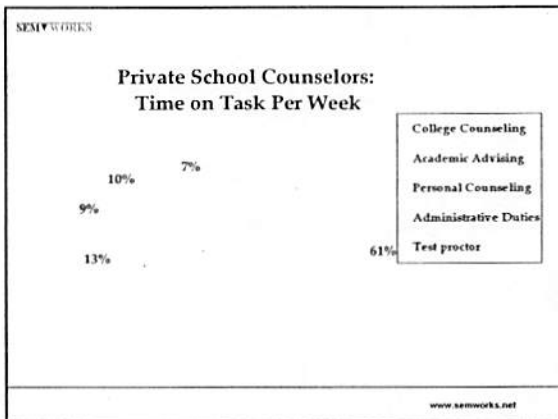
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Public School Counselors: Time on Task Per Week



Task	Percentage
College Counseling	32%
Academic Advising	21%
Personal Counseling	16%
Administrative Duties	11%
Test proctor	20%

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Average Counselor Case Loads

- All Schools (grades 9-12) = 315:1
- Public Schools = 309:1
- Private Non-Parochial = 194:1
- Private Parochial = 241:1

NACAC Recommendation = 100:1


- California = 960:1, Minnesota = 830:1, Arizona = 762:1, Utah = 756:1

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How Counselors Impact the Admissions Process

- Provide access to college materials
- Advise prospective students & parents
- Prepare and submit application materials



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How We Can Help Counselors Help Students

- Provide Institutional Information - *Updated!*
 - ♦ Quick facts/profile
 - ♦ Admissions process
 - ♦ Admissions materials
 - ♦ Update on policy or procedure changes

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SEMIWORKS

How We Can Help Counselors Help Students

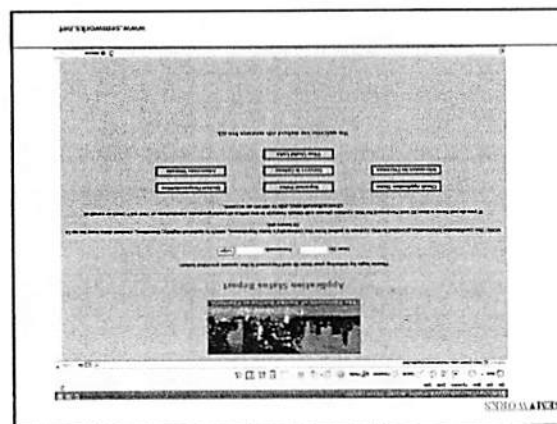
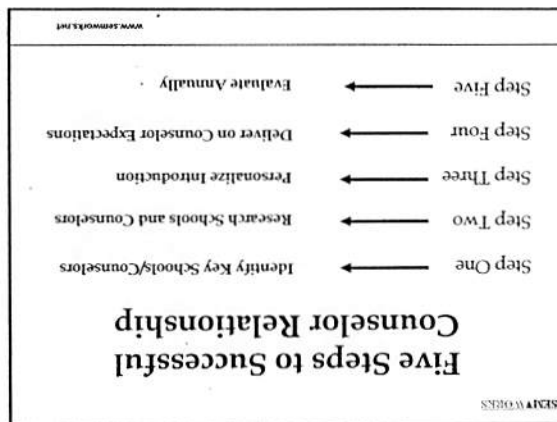
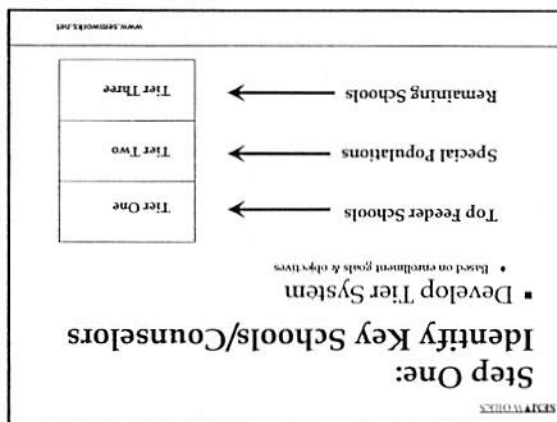
- Provide Applicant/Enrollment Reports
- Develop Counselor Website

Personalized portal	Applicant status
Student/Faculty profiles	Travel schedules
FAQ's	Important dates
Request forms	Contact information

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Step Two: Research Schools / Counselors

- Request information from previous territory managers
- Consult Enrollment Planning Service (EPS) data
- Review school profile/websites

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School
Search



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Counseling Department



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Step Three: Personalize Introduction

- Introduce yourself as personal contact
- Determine counselor expectations

Private visits
E-mail
On-site admissions
Workshop requests
Enrollment reports



Counselor visits
Access to web portal
Materials needed
Campus Visits
Newsletter

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Counselor Information Card

High School Name: _____ Title #: _____
 Address: _____
 Web Address: _____
 Phone Number: _____
 Fax Number: _____
 Counselor(s): _____
 E-mail Address: _____
 Counselor prefers to be contacted through: E-Mail Letter Phone Fax
 Private Visits: YES NO Access to Web Portal: YES NO
 Counselor Visits: YES NO Visit to Campus: YES NO
 Workshop Request: YES NO Newsletter: YES NO
 Requests On-Site Admissions: YES NO Enrollment Reports: YES NO
 Materials Requested:
 Applications Vase Books Visit Brochures CD-Roms Scholarship Information
 Additional Notes

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Step Four: Deliver on Counselor Expectations

- Develop Counselor Database
 - ♦ Contact information
 - ♦ Counselor expectations
- Develop Tracking Mechanism
 - ♦ Include counselor initiatives
 - ♦ Enrollment information

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Step Five: Evaluate Annually

- Evaluate ALL Counselor Initiatives
- Request Written Evaluation
- Compare Enrollment Report

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Comprehensive Counselor Initiatives

- Counselor Website
- Communication Plan
- Counselor Newsletter

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Comprehensive Counselor Initiatives

- Counselor Visit Programs
 - Bus Tours Individual Visits
 - Open Houses Local Receptions
- Advisory Boards
- Counselor Gifts ----->
- Counselor Conferences



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Transfer Counselors

- Provide transfer equivalency & curriculum information
- Visit regularly
- Be available for pre-transfer advising
- Offer training and workshops for advisors
- Be willing to serve on advisory boards, as requested

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Group Discussion

Scenario # 1: You receive a call from a "Tier One" counselor who is upset because he did not receive notification of your new admissions deadlines. As a result of this miscommunication, an honor student did not complete the application process in time to be considered for the fall semester.

Questions:

- How do you respond to this counselor?
- How might you avoid future miscommunications?

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Group Discussion

Scenario # 2: As a part of your fall planning, you are busy scheduling visits to your tier one and two schools. When you contact the number three school on your list, you are instructed to mail materials as they do not allow private visits.

Question:

- What do you do?

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Group Discussion

Scenario # 3: You arrive for your scheduled high school visit and check-in with the secretary. Due to an oversight on the counselor's part, students were not notified of your visit. The secretary suggests you reschedule and return when you will have access to students.

Question:
How do you respond?

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Group Discussion

Scenario # 4: You are meeting with a prospective student on your campus. During your conversation, the student tells you that his counselor discouraged him from visiting your campus. The counselor advised the student to attend another institution and offered to schedule a visit for him.

Questions:
How do you respond to the student?
How do you address the counselor issue?

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Ten Tips for Building Relationships with Counselors

1. Take the time to introduce yourself.
2. Respect their role within the high school and their knowledge of the admissions process.
3. Initiate several contacts throughout the year.
4. Contact counselors when reviewing applicant files.
5. Be honest when discussing applicants and admissibility.
6. Get to know the counseling secretary/administrative assistant.
7. Don't expect too much of their time.
8. Be careful not to oversell your institution.
9. Never assume that the counselor has had positive experiences with the institution you represent.
10. Respond to all counselor requests with the same urgency of prospective student requests.

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