



Creating a Healthy Goal-Driven Culture

Dr Michael J Ritter

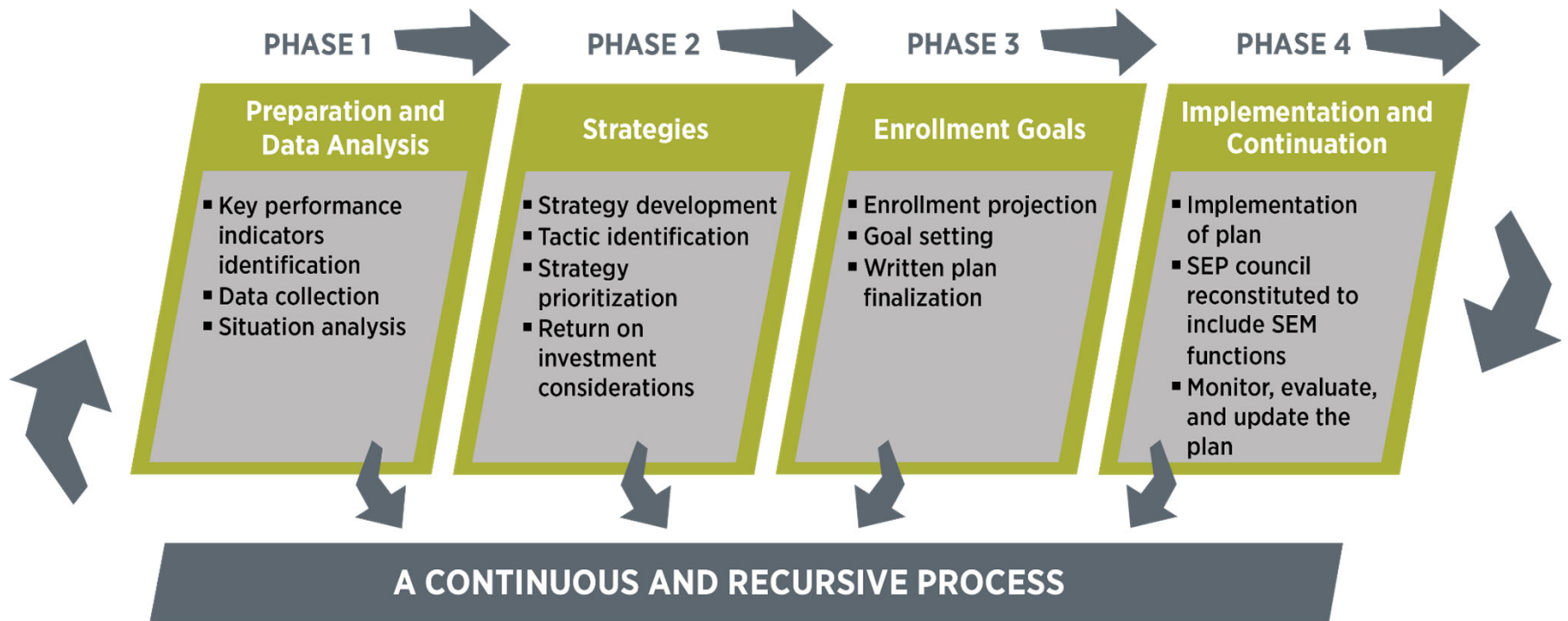
Vice President & Senior Consultant

RNL National Conference, July 2022

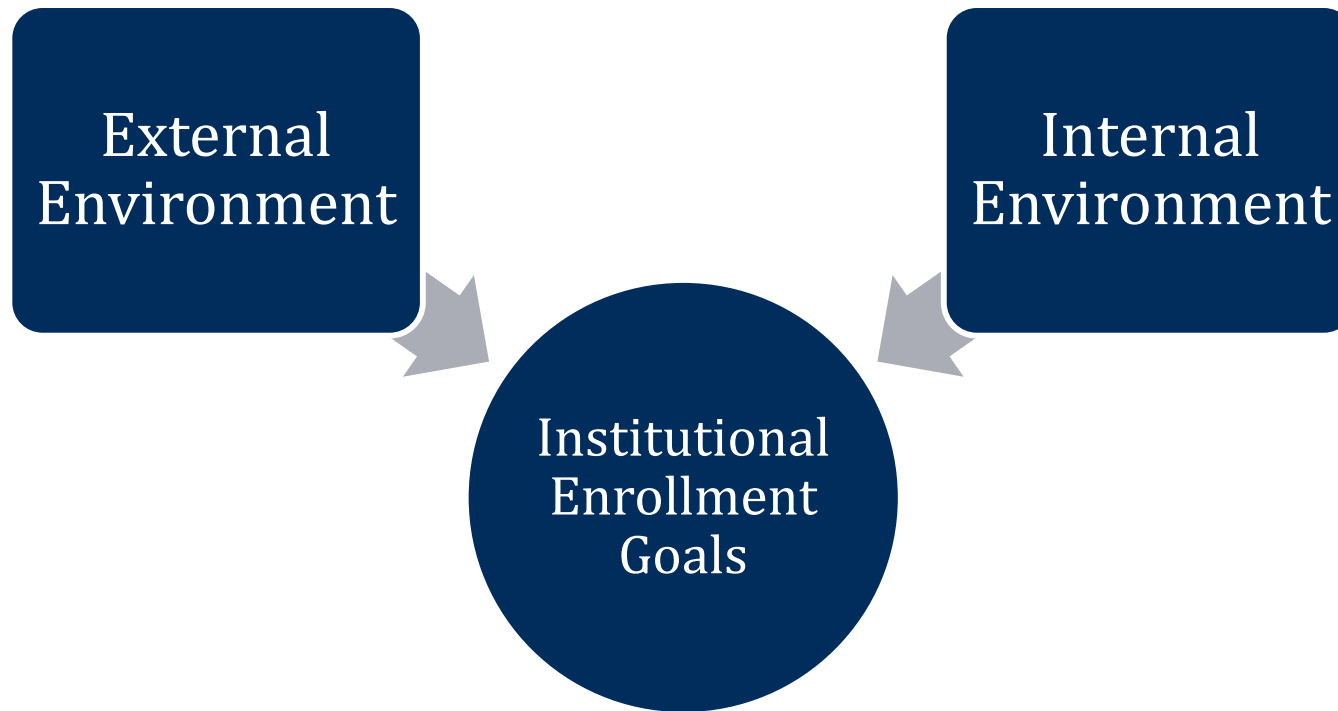


Before we get
started...

Strategic Enrollment Planning



Before we get started...



Slide stolen from secret presidential training deck

How to set goals:

- Goal = Last Year + 1
- Goal = Highest Ever + 1
- Goal = Last year + X%
- Goal = RoundUp(Last Year) + X%
- Goal = Last Year + \$\$ we need to give raises
 - Then, email campus to make sure everyone knows their raise depends on Admissions.

Agenda

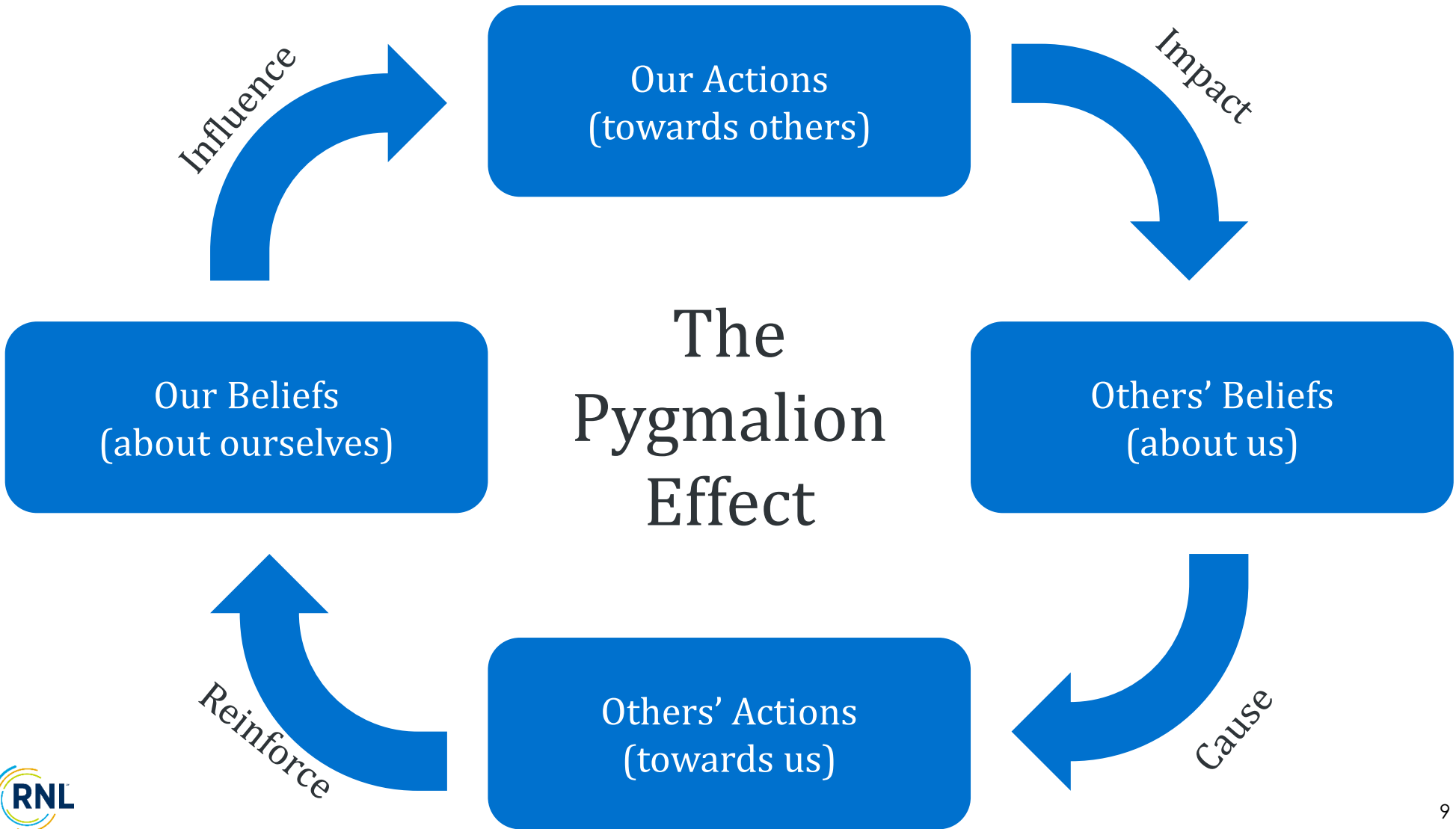
1. Foundational Principles
2. Tracking Progress
3. Keeping It Healthy
4. Questions / Discussion



Foundational Principles

An empty lecture hall with rows of grey seats and a central aisle leading to a stage. A blue horizontal band is overlaid across the middle of the image, containing the text "Goals should be challenging" in white. The seats have small white numbers on them, such as "5" and "9".

**Goals should be
challenging**

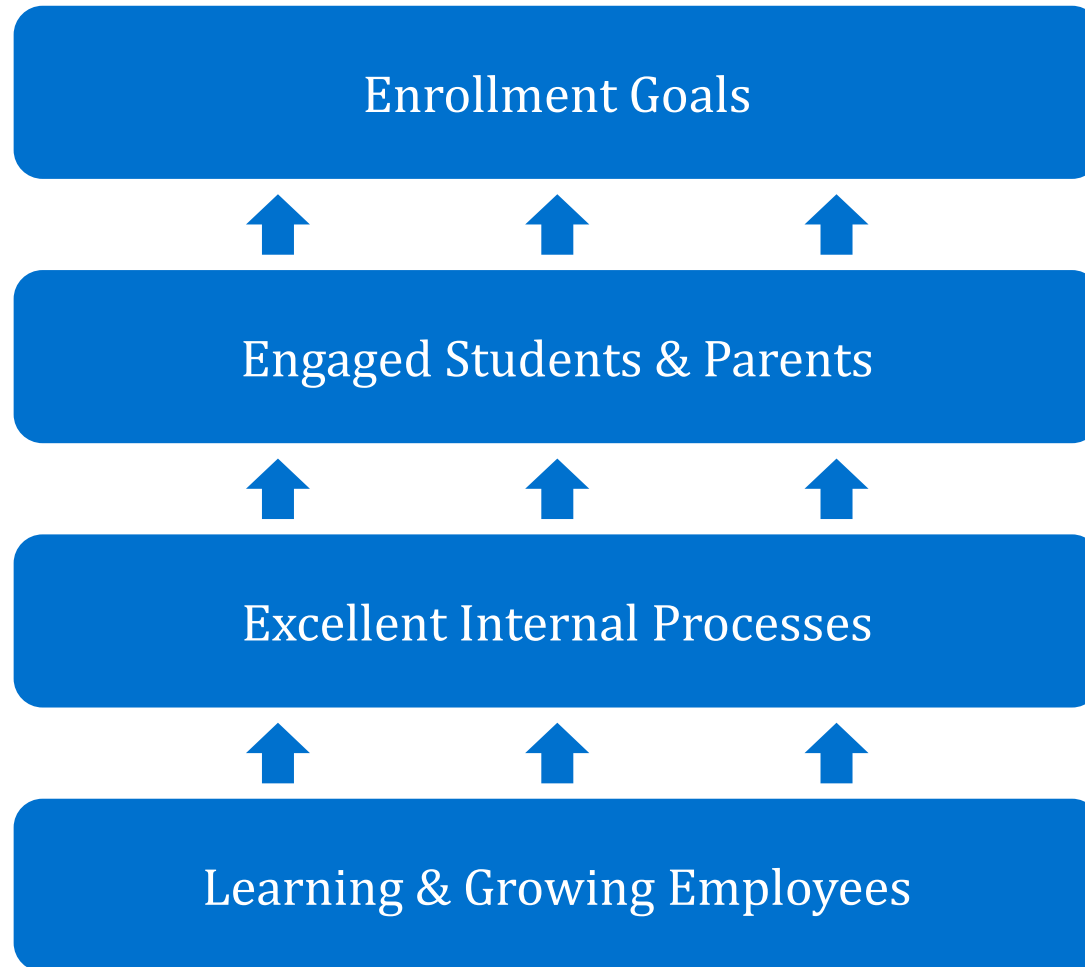




**Goals should be
challenging and attainable**



Everything is connected



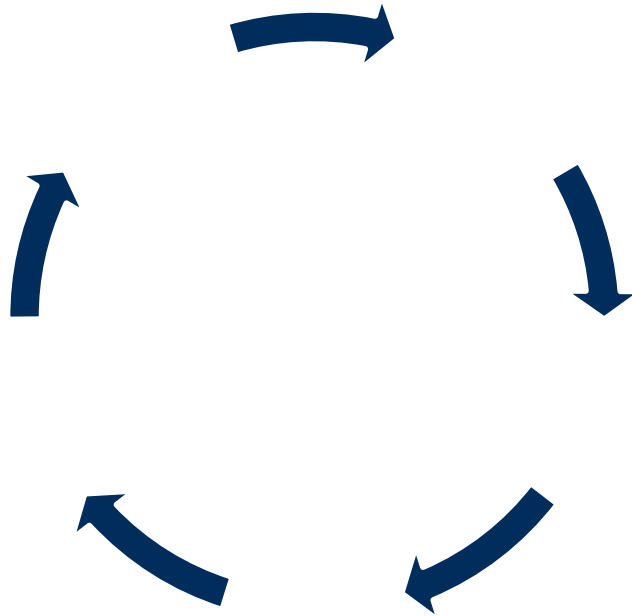


**Recruiting is about
relationships**

Types of Goals

Activity Metrics

Result Metrics



What Employees Want

...whether they realize it or not

- To be known by you
- To know how their work matters
- To know whether they're doing a good job



For more on these concepts, see: Lencioni, P. (2015). *The truth about employee engagement*. Jossey-Bass.

What employees want

...to know whether they're doing a good job

- Does your staff know what you want them to do, even if you're gone?
- Are they able to assess if they're meeting your expectations, without asking you?
- Do your expectations outline the set of behaviors that will lead to success?

What employees want

...to know how their work matters

- Have you clearly articulated the connections between the strategies and tactics your office employs and the results you're expecting?
- Do the activities included in your goals reinforce the connections that exist inside and outside your office processes?

What employees want

...to be known by you

- Goal-focused management can often be mechanical. How do you ensure that you're treating everyone as individuals?
- Use goals as the framework to focus conversations around broad principles and impact



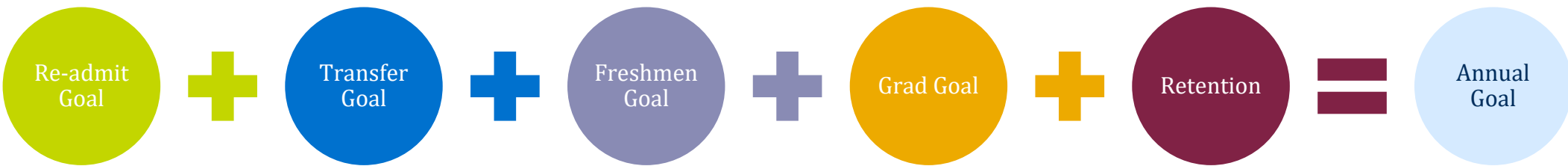
Tracking progress

A blue-tinted photograph of a university courtyard. In the foreground, there are several large, classical-style arches supported by columns. In the background, a large, ornate building with a prominent dome is visible, surrounded by trees and a green lawn. The overall scene is framed by the arches, creating a sense of depth and perspective.

Annual Goals

Annual Goals

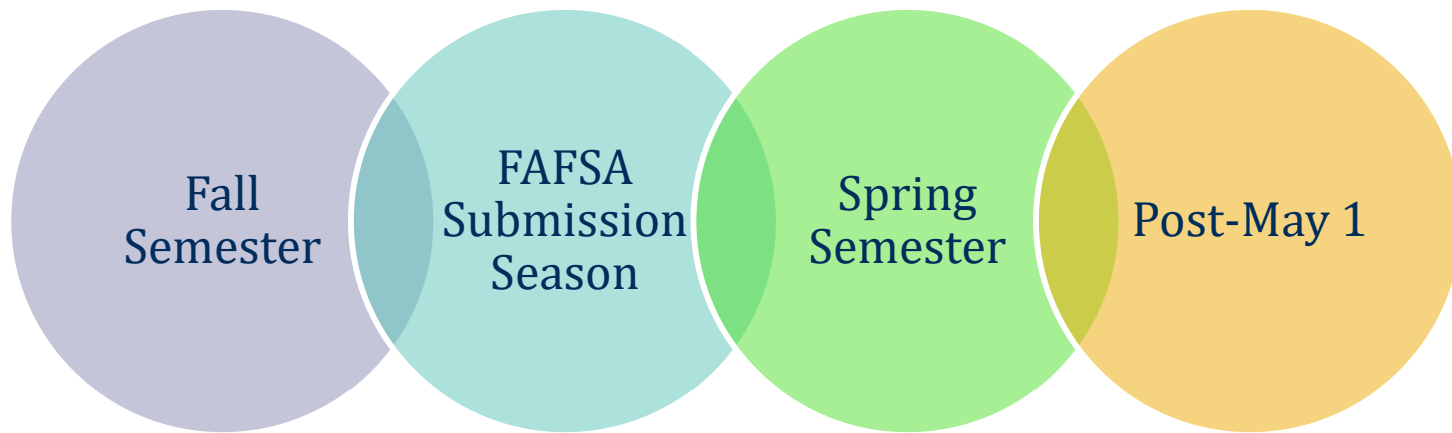
In-Total, by Affinity, and by Territory





Seasonal Goals

Seasonal Goals



A blue-tinted photograph of a university courtyard. In the foreground, there are several large, classical-style arches supported by columns. In the background, a large, domed building with a central spire is visible, surrounded by trees and a green lawn. The overall scene is framed by the arches, creating a sense of depth and perspective.

Weekly Goals



Translating and Implementing Goals with Territory Managers

Weekly Goals

Measure everything worth measuring (within reason)

Campus Visits Goals

Territory Travel Goals

Communication Outreach Goals

Funnel Metrics



**They Won't Enroll If They
Don't Visit**

Campus Visit Goals

Individual Campus Visits

- Monthly Goals by Territory

Visit Days

- Each event should have an attendee goal from each territory.



**They Enroll Less If You Don't Visit Them
(and Their Influencers)**

Territory Travel Goals

College Fair Goals

- Always looking to measure and increase.
- Assess by attendance and funnel outcomes.

High School Visits

- Each Territory should have a goal to visit 'X' amount of high schools per semester.
- They should have a clear and defined purpose for each visit.

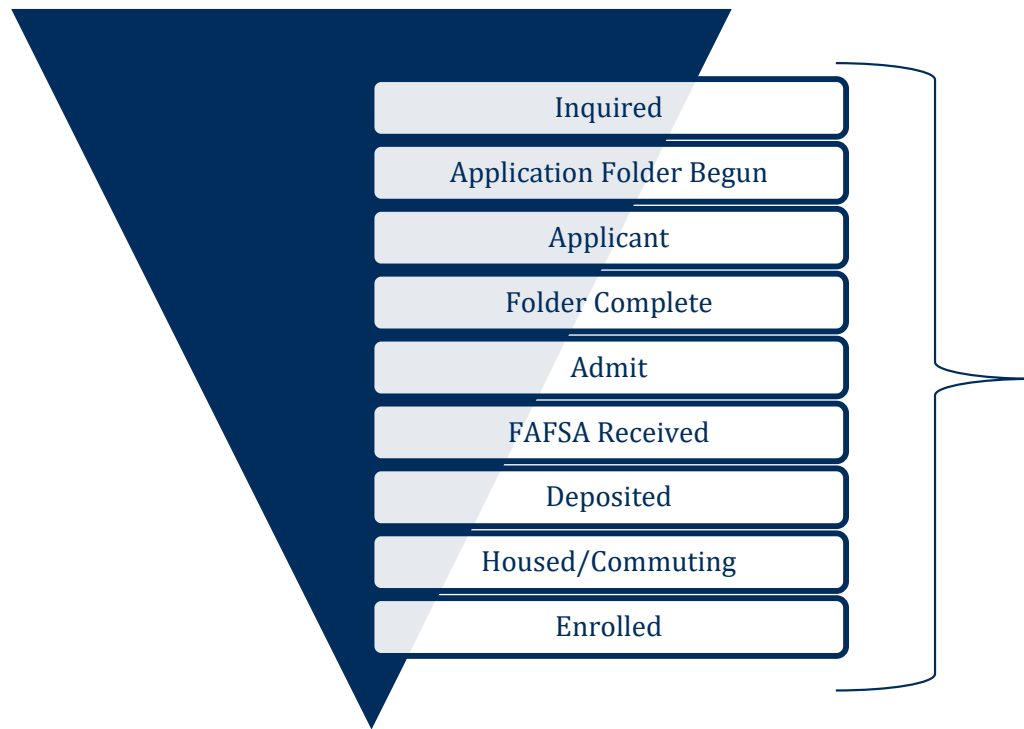


They Don't Enroll If They Don't Apply

(or if they don't Inquire, or Send Transcripts, or File a FAFSA, or Deposit,
or Fill Out Our Forms...)

Funnel Metrics.

Building Relationships in a Process Driven World



More than stages to track. See each step, each process as a moment to create relationships.



**They Don't Enroll If You
Don't Talk to Them**

Communication Goals

Phone

- Time Intensive
- Still the Best Relationship Building Tool. (When you can actually get them on the phone...)
- Track who you are talking to: Student or Parent.

Texting

- Easy
- Great for Nudging Students Through our 2 Million Different Processes.

Email

- Versatile
- Great way to Communicate Process, & Talk to Parents.

A blue-tinted photograph of a university courtyard. In the foreground, there are several large, classical-style arches supported by columns. In the background, a large, ornate building with a central dome is visible, surrounded by trees and a green lawn. The overall scene is a typical university campus setting.

Tracking It All (And How to Tell Others About It)

Tracking It All

Weekly

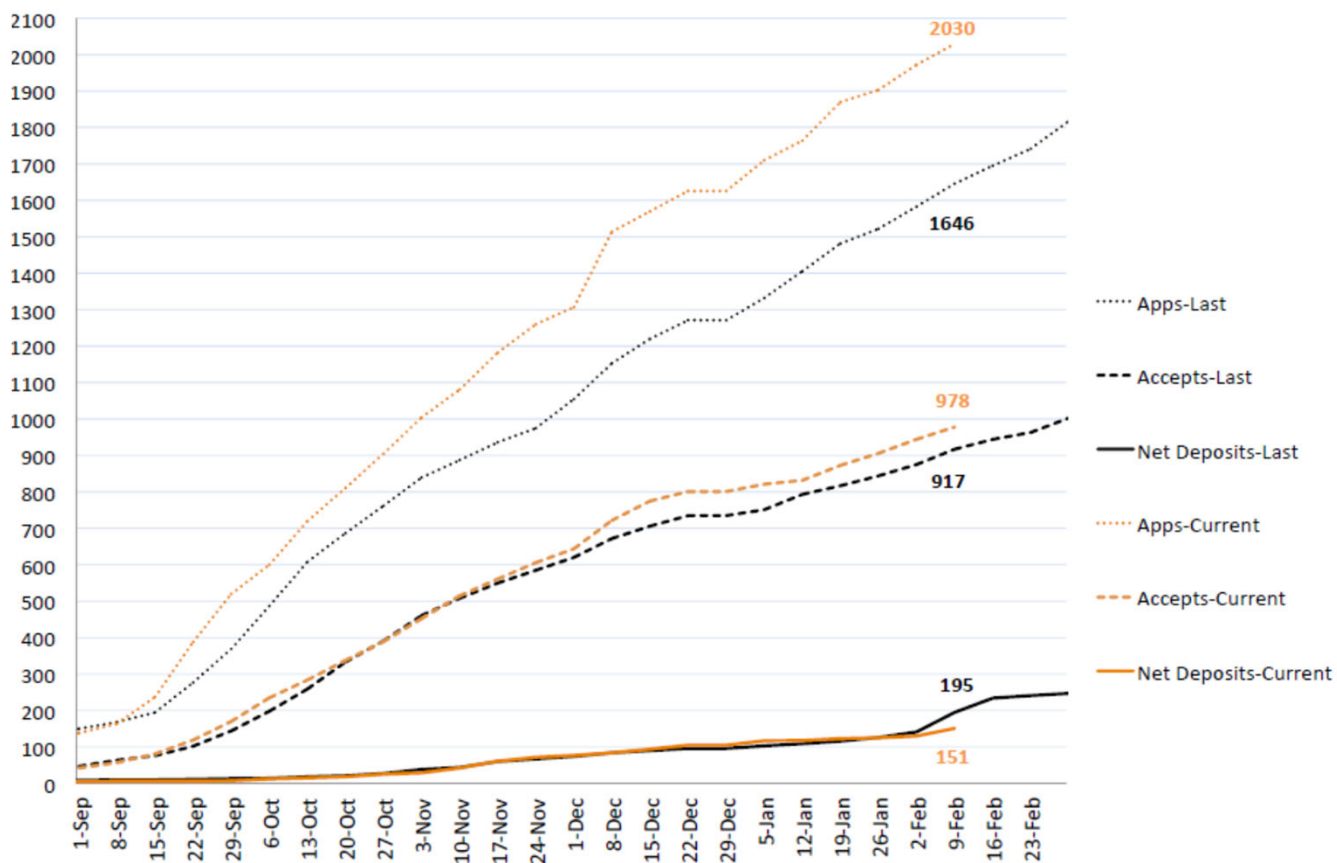
Counselor Territory Stats	Weekly Goal	Weekly Actual	Difference	Cumulative Goal	Cumulative Actual	Difference				
	Inquiries							Counselor Name:		
Applications										
Acceptances							For the Week Prior To Sunday:			
Deposits							(Month)	(Day)	(Year)	
Net Deposits										
Counselor Activity Stats	Attempted Calls	Completed Calls	Emails, Texting	High School Visits	College Fairs	Campus Visits	Comments			
	Sunday	0	0	0			→			
Monday							→			
Tuesday							→			
Wednesday							→			
Thursday							→			
Friday							→			
Saturday	0	0	0				→			
Weekly Total										
Goal	70	30	100							



Tracking it All

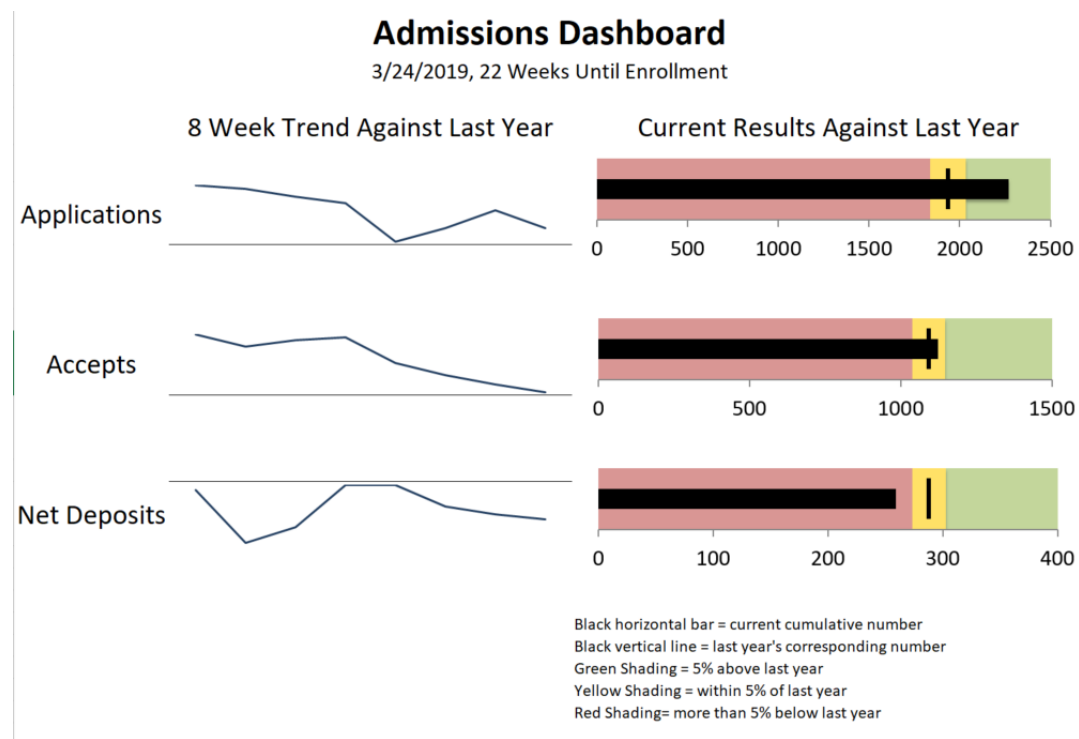
Reporting Out to "The Other"

Traditional Stats: Fall 2014 (current) vs. Fall 2013 (last)



Tracking it All

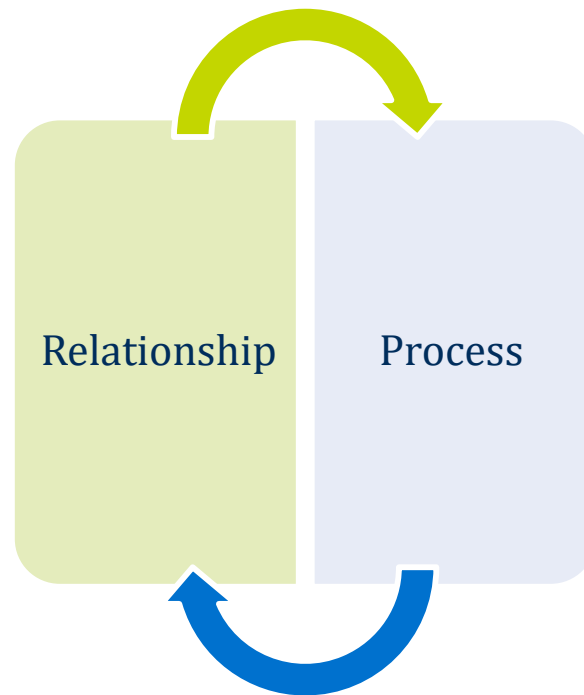
Reporting Out to “The Other”



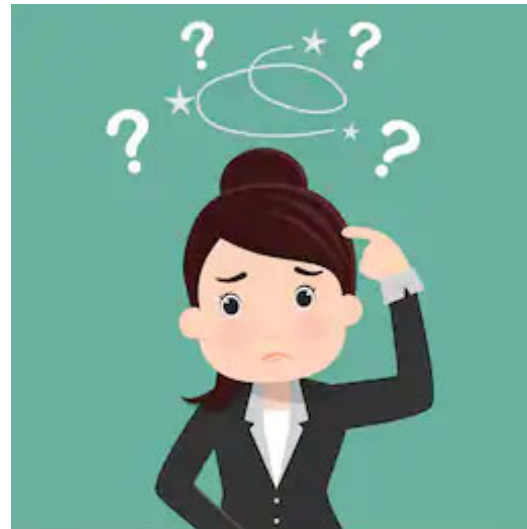


Keeping It
Healthy:
A Culture of
Discipline
(and Care)

Knowing Why We Do What We Do



Why Should We Expect Reps Without Clearly Communicated Goals and Guidance to Make Their Final Goal?





The

The Purpose of Measurements and Goal Setting is To Create a Culture that Facilitates A Good Working Relationship with Your Employees.

Keeping Staff Focused

Cyclical and Weekly Meetings

- Weekly Meetings:
 - 30 minutes with each rep.
 - Focus on the activities that are driving the goals.
 - Be prepared for things to go wrong.
 - Handling Failure.
 - Flexing Activity Standards.

Keeping Staff Focused

Cyclical and Weekly Meetings Center Around Activity Stats

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Friday							→			
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Goal	70	30	100							



Keeping Staff Focused

Activity Stats: Primarily for Guidance. Rarely Punitive.

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Goal	70	30	100							



Keeping Staff Focused

Cyclical and Weekly Meetings

- Cyclical Meetings: Semi-Annual or Quarterly Employee Reviews.
 - Piggy-back institutional annual reviews to implement bigger picture goal reviews.



And finally:

**No one wants to be micromanaged.
No one wants to be a micromanager.**

Beware the Pitfall of Micromanagement

“Give the What, not the details of the How”

- The purpose of all tracking with our staff is to provide a framework for what we should be doing.
- Though we guide activities with careful goal setting, a well-trained territory manager should be trusted to know how best to meet the metrics for their territory.

Beware the Pitfall of Micromanagement

“Let it Go”

- Set the Standard.
- Train your staff well.
- Meet regularly to support and monitor the metrics.
- Let go of the minutiae.



When Things Change: “501”

The image shows a large, empty theater or lecture hall. The seats are arranged in rows, with a central aisle leading towards a stage area at the far end. The lighting is somewhat dim, creating a sense of quiet and solitude. A blue horizontal band is overlaid across the middle of the image, containing the text.

**Amidst Chaos,
Be Disciplined.**



Questions /
Discussion

Sources

- Fried, J., & Hansson, D. H. (2018). *It doesn't have to be crazy at work*. HarperBusiness.
- Kaplan, R. S., & Norton, D. P. (2004). *Strategy maps: Converting intangible assets into tangible outcomes*. Harvard Business Press.
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- Muller, J. Z. (2018, January 21). The tyranny of metrics: The quest to quantify everything undermines higher education. *The Chronicle of Higher Education*, 64(20), Retrieved from https://www.chronicle.com/article/The-Tyranny-of-Metrics/242269?cid=trend_right_a

Thank you

Please contact us if you have any questions.

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