



PRESENTATION HANDOUT



Creating a Healthy Goal-Driven Culture

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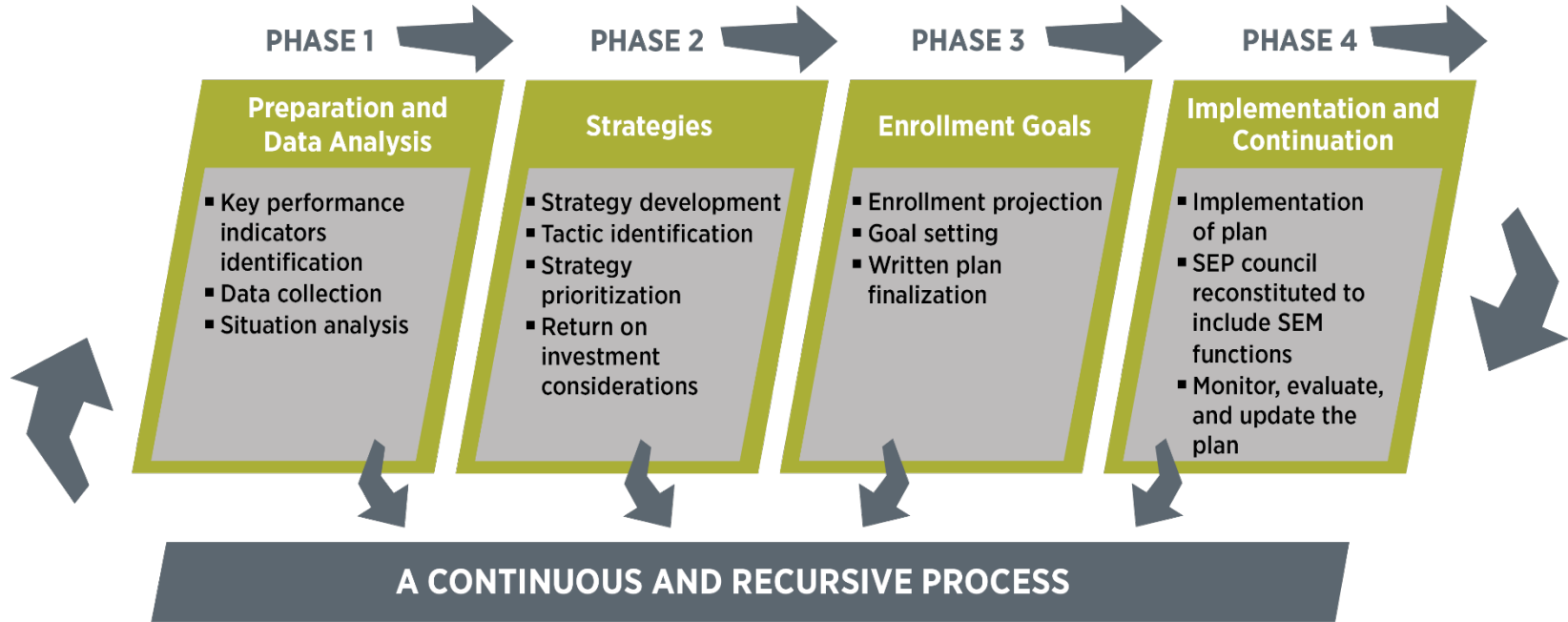
Ken Huus

Vice President

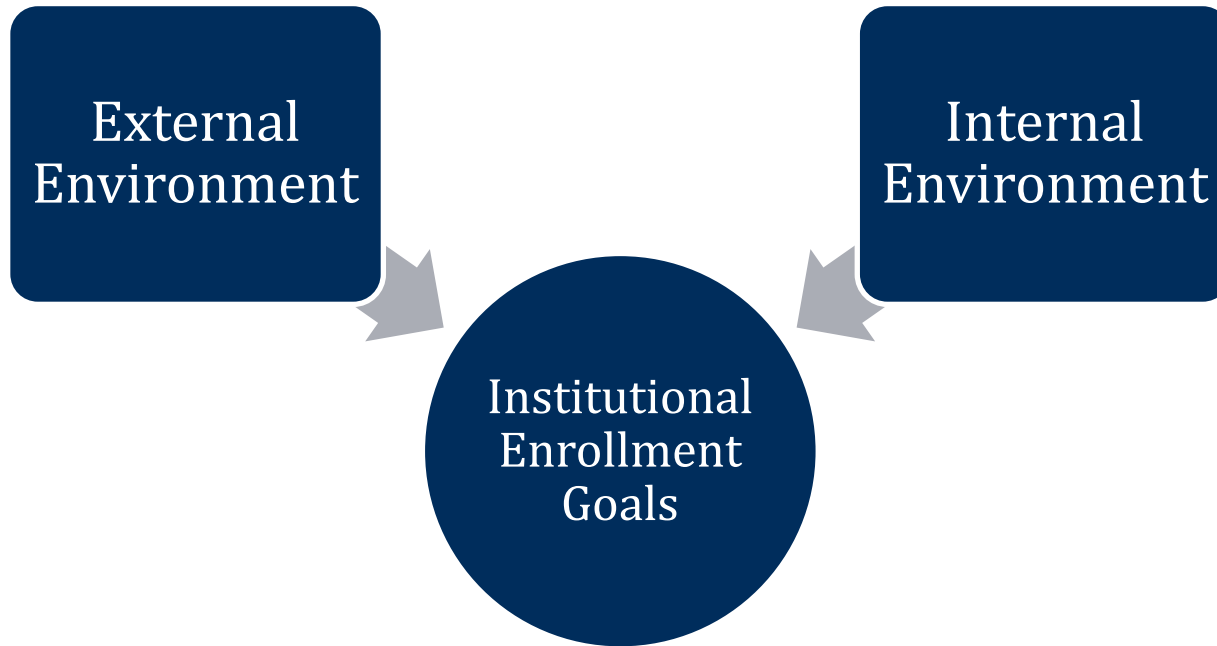


Before we get
started...

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

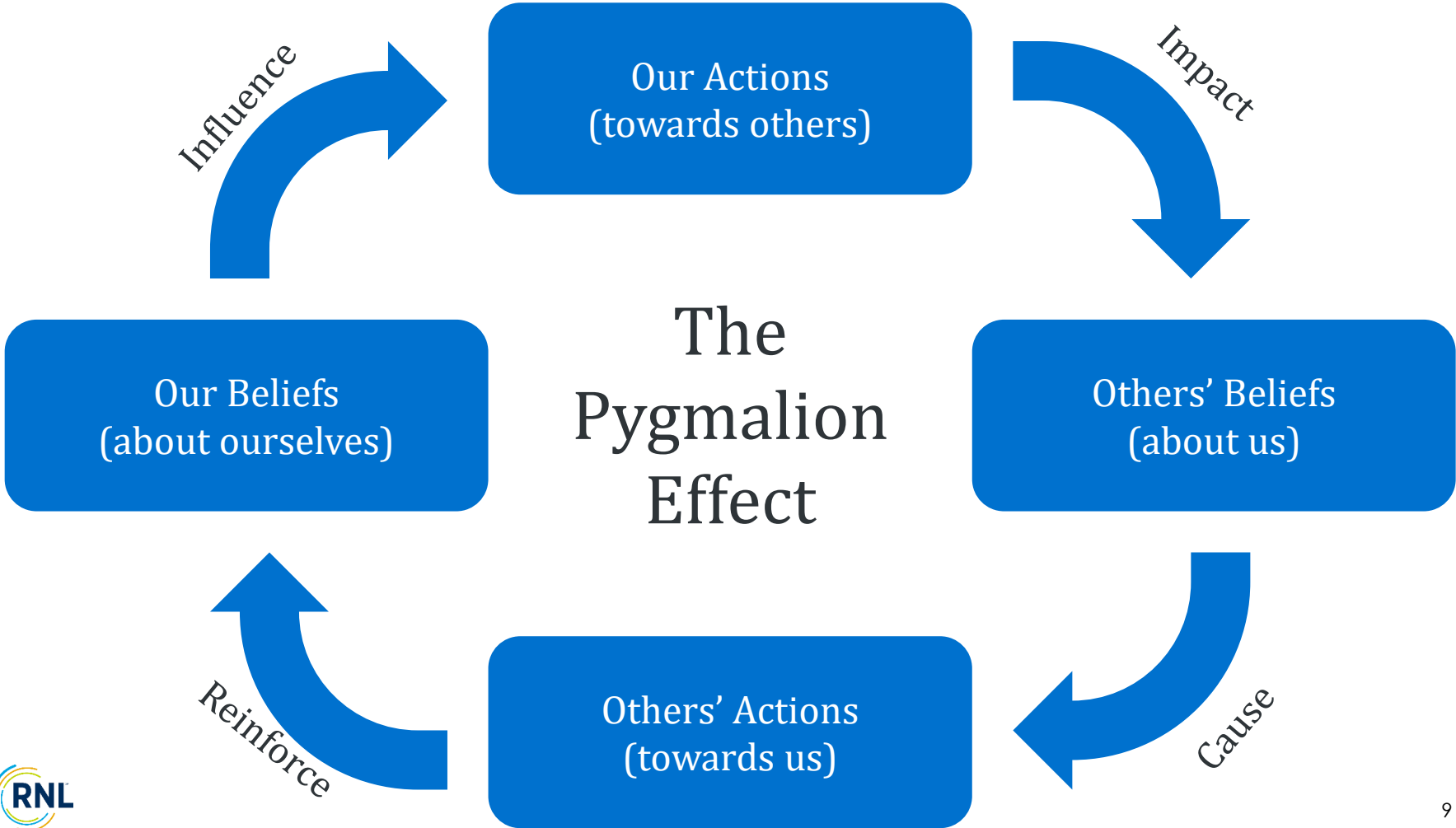
1. Foundational Principles
2. Tracking Progress
3. Keeping It Healthy
4. Questions / Discussion



Foundational Principles



**Goals should be
challenging.**

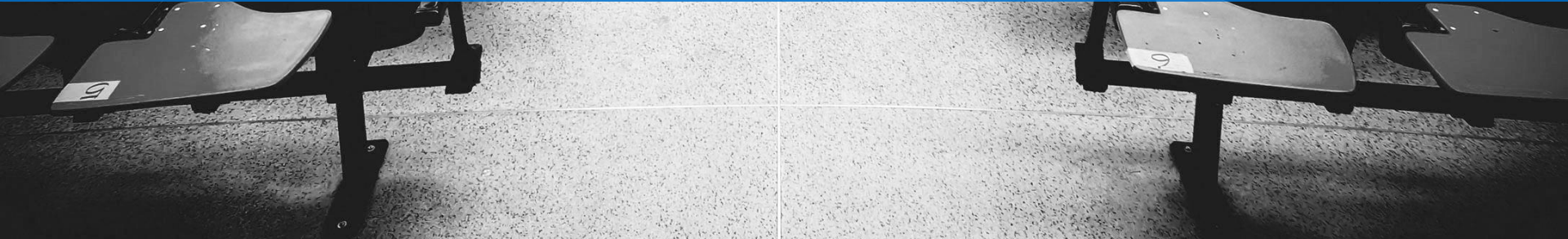


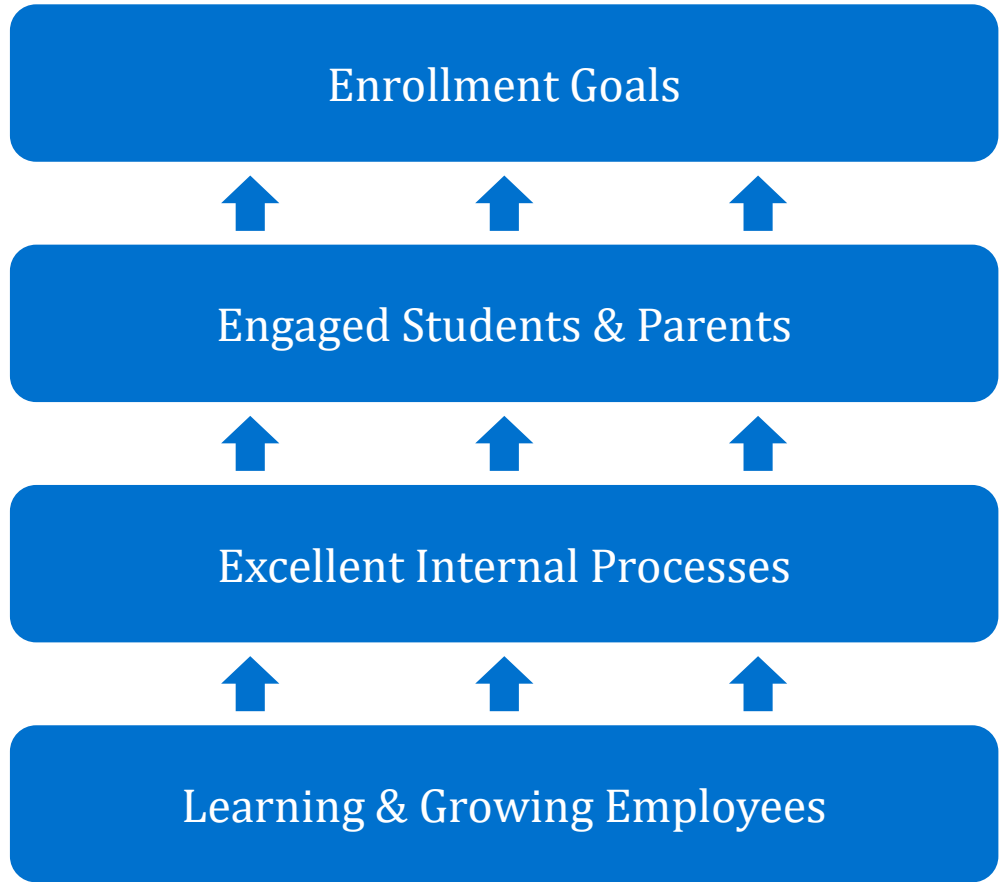


**Goals should be challenging
and attainable.**



Everything is connected.





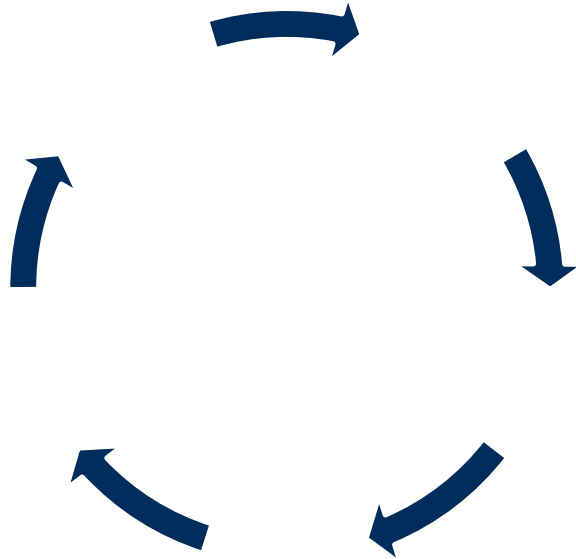


**Recruiting is about
relationships.**

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.



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.



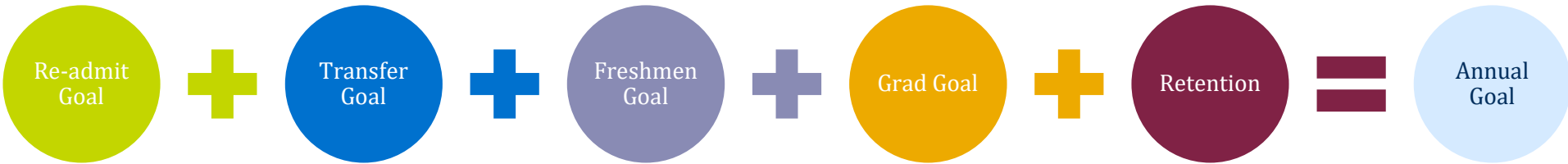
Tracking Progress



Annual Goals

Annual Goals

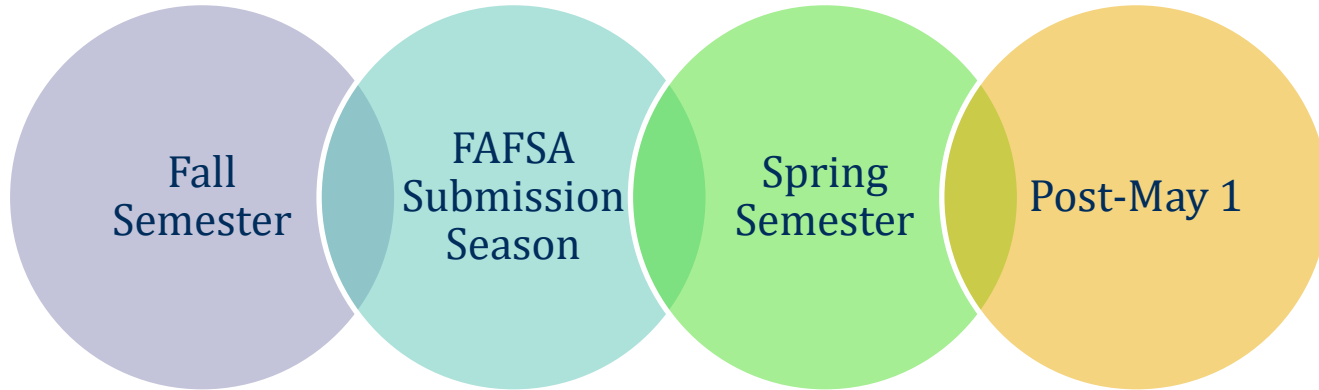
In-Total, by Affinity, and by Territory





Seasonal Goals

Seasonal Goals





Weekly Goals

An empty theater with rows of seats and a central aisle leading to a stage. A blue banner is overlaid across the middle of the image.

**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

An empty lecture hall with rows of grey seats and a central aisle leading to a stage. A blue banner is overlaid across the middle of the image.

**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.

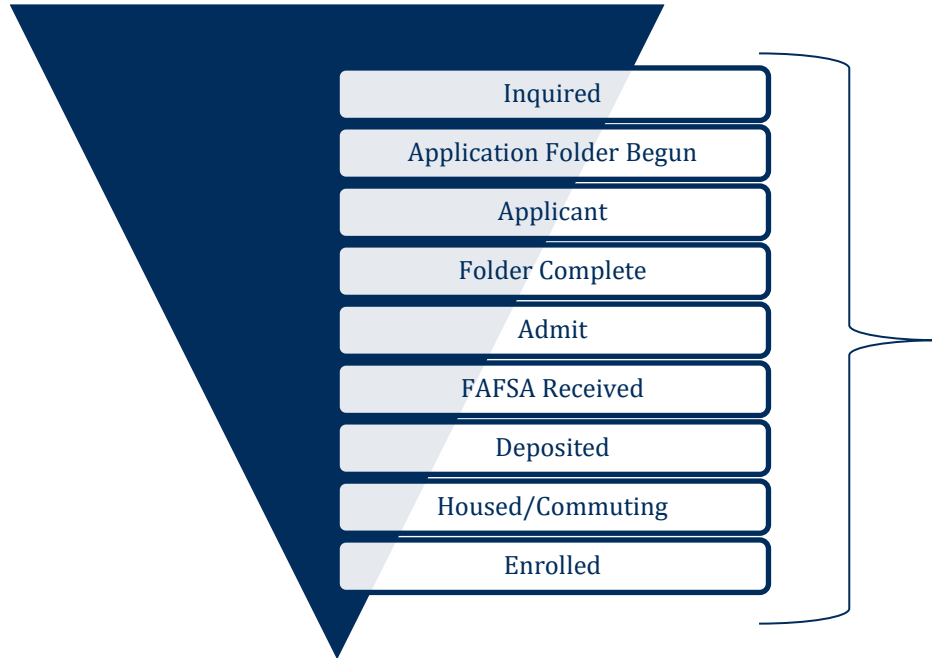


They don't enroll if they don't apply.

(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.

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 white text.

**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, and talk to parents.

The background is a blue-tinted photograph of a university courtyard. In the foreground, there are several large, classical-style arches supported by columns. In the middle ground, there is a large, ornate building with a central dome and many windows. The courtyard is filled with green grass, trees, and some people walking. The overall scene is bright but has a strong blue color cast.

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

Tracking It All

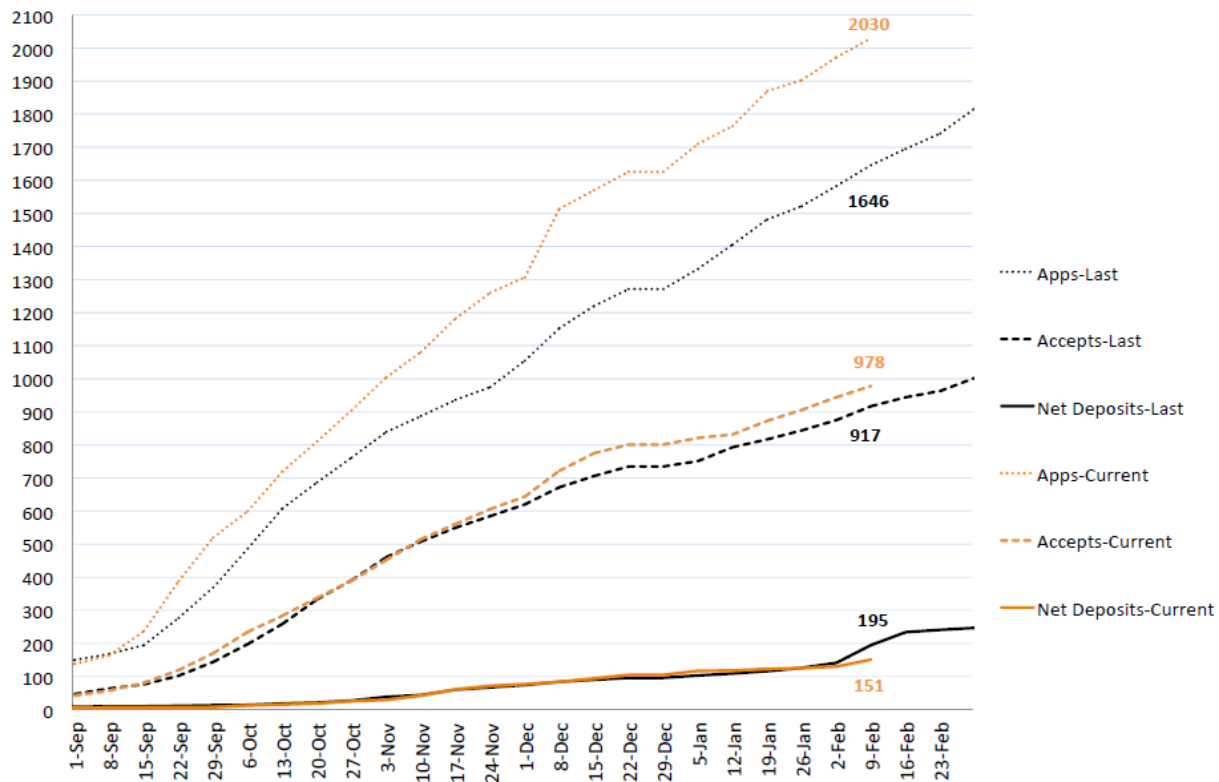
Weekly

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

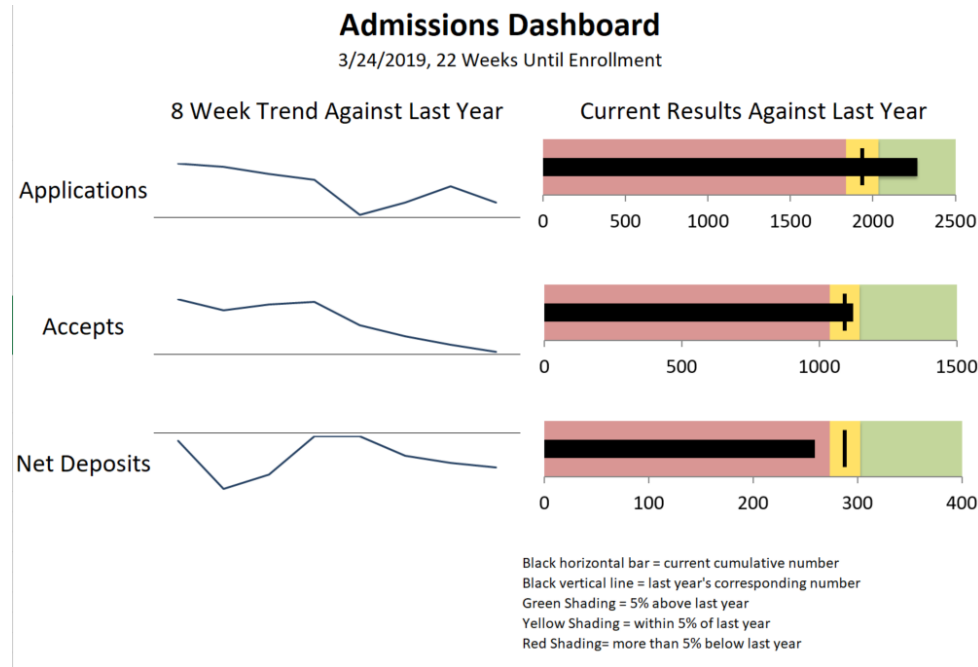
Reporting Out to “The Other”

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



Tracking It All

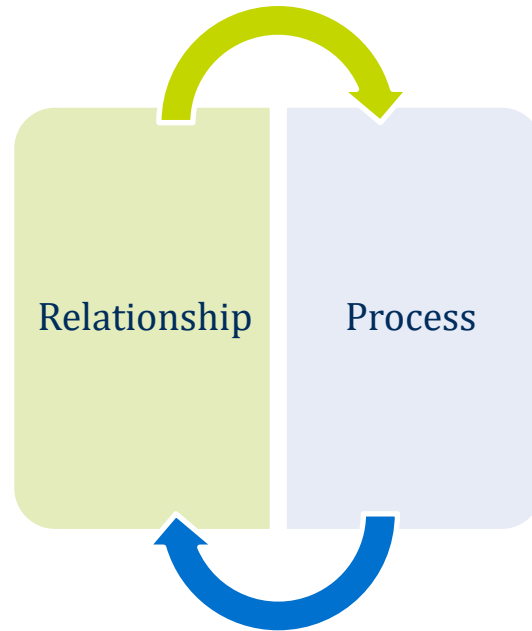
Reporting Out to “The Other”





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 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

Counselor Territory Stats	Weekly Goal	Weekly Actual	Difference	Cumulative Goal	Cumulative Actual	Difference				
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Goal	70	30	100							



Keeping Staff Focused

Activity Stats: Primarily for Guidance. Rarely Punitive.

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Weekly Total										
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”

An empty theater with rows of seats and a central aisle leading to a stage. The seats are dark-colored with attached writing tablets. The floor is light-colored and polished. The text "Amidst chaos, be disciplined." is overlaid in white on a blue horizontal band across the center of the image.

**Amidst chaos,
be disciplined.**



Questions /
Discussion

Sources

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Thank you

Please contact us if you have any questions.

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