



# Creating a Healthy Goal-Driven Culture

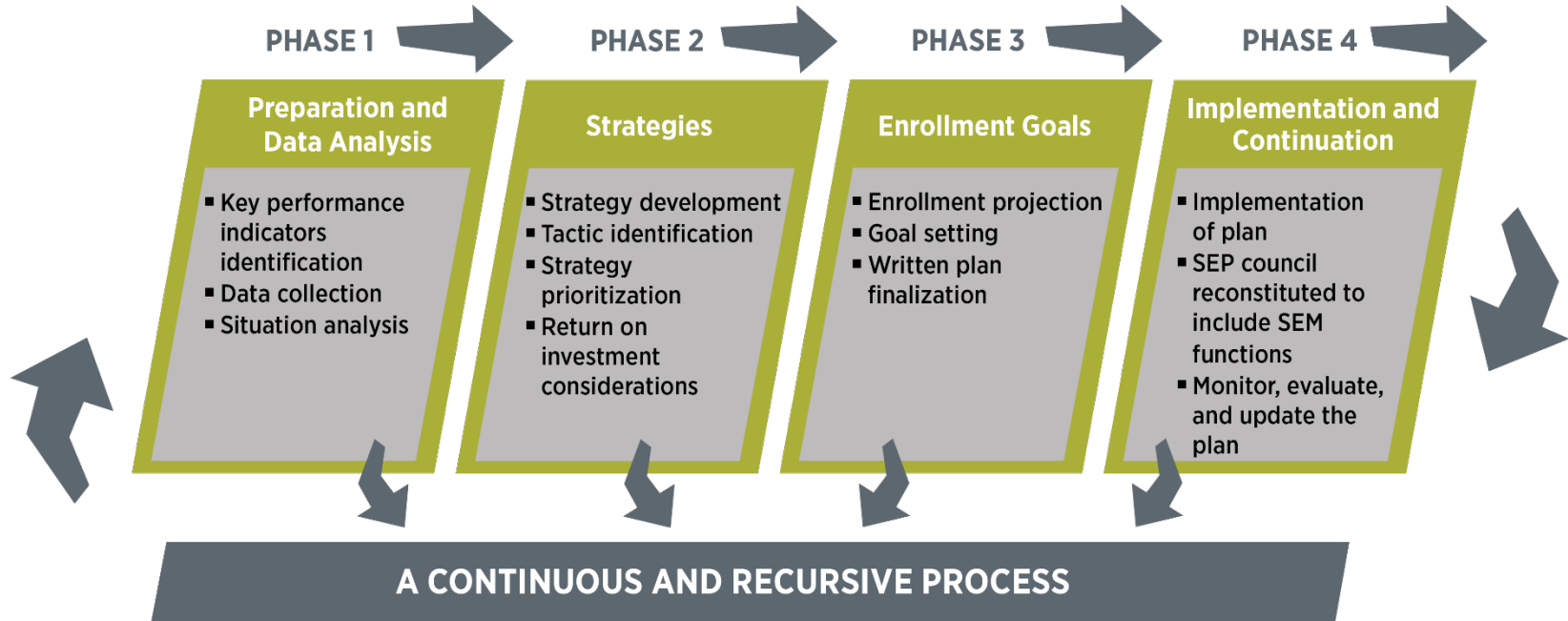
Dr Michael J Ritter

*Senior Vice President, RNL*

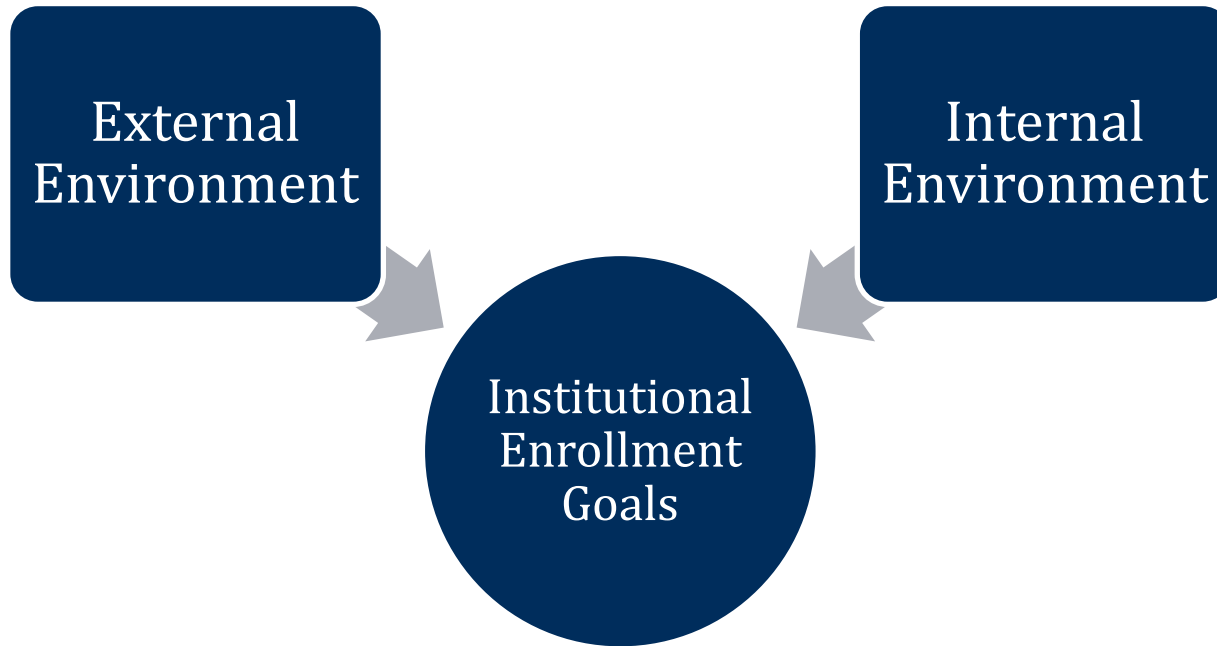


Before we get  
started...

# 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

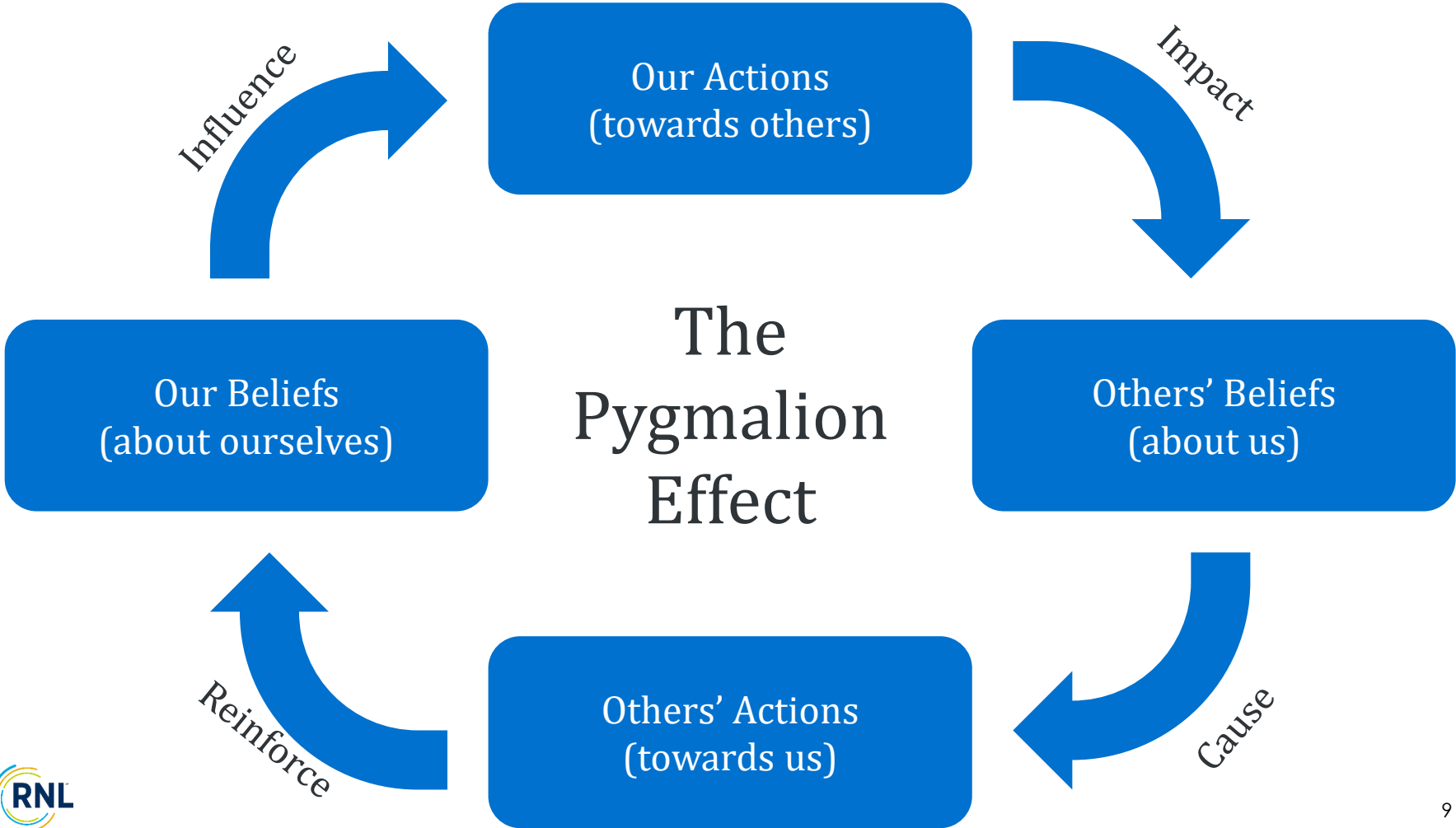


# Foundational Principles



**Goals should be  
challenging**



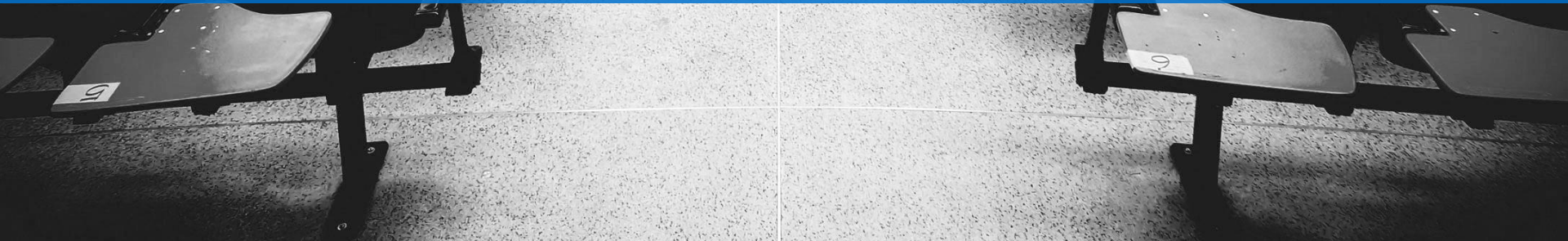


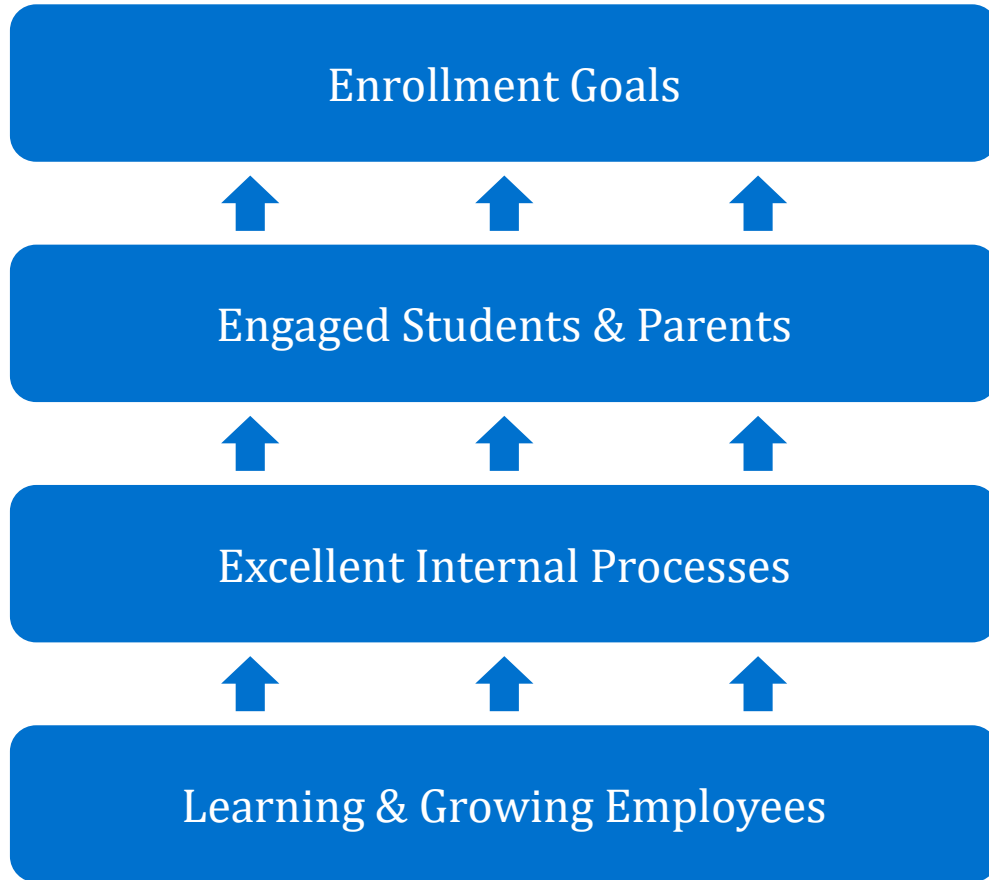
An empty lecture hall with rows of grey seats and a central aisle leading to a stage. A blue horizontal band is overlaid across the middle of the image, containing white text.

**Goals should be  
challenging and attainable**



**Everything is connected**





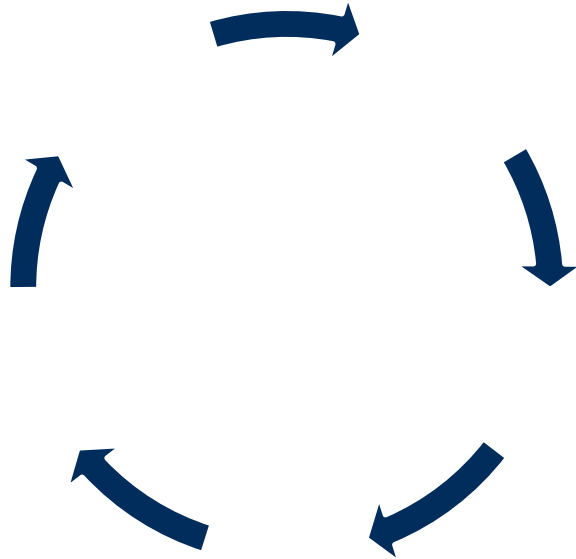
The background of the image is a black and white photograph of an empty stadium or arena. Rows of grey plastic seats with attached writing tablets are visible, arranged in a semi-circle. A central aisle leads to a set of concrete stairs that ascend towards the back of the seating area. The lighting is even, highlighting the texture of the seats and the floor.

**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



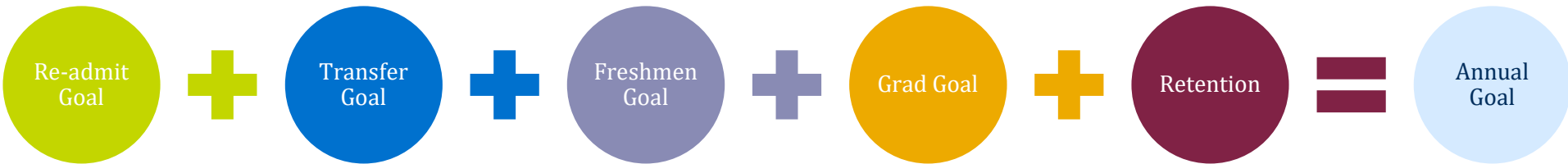
Tracking Progress



# Annual Goals

# Annual Goals

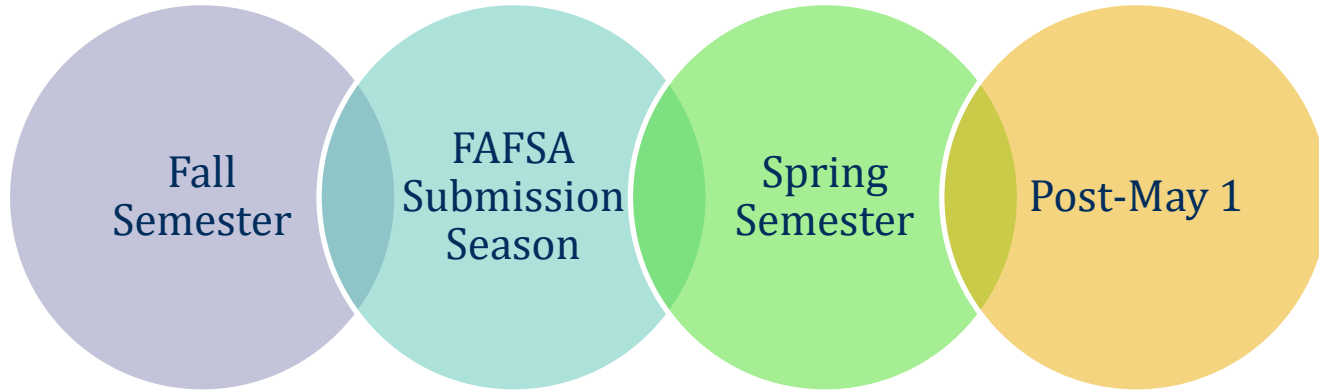
*In-Total, by Affinity, and by Territory*





# Seasonal Goals

# Seasonal Goals





# Weekly Goals





# 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 plastic 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 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.

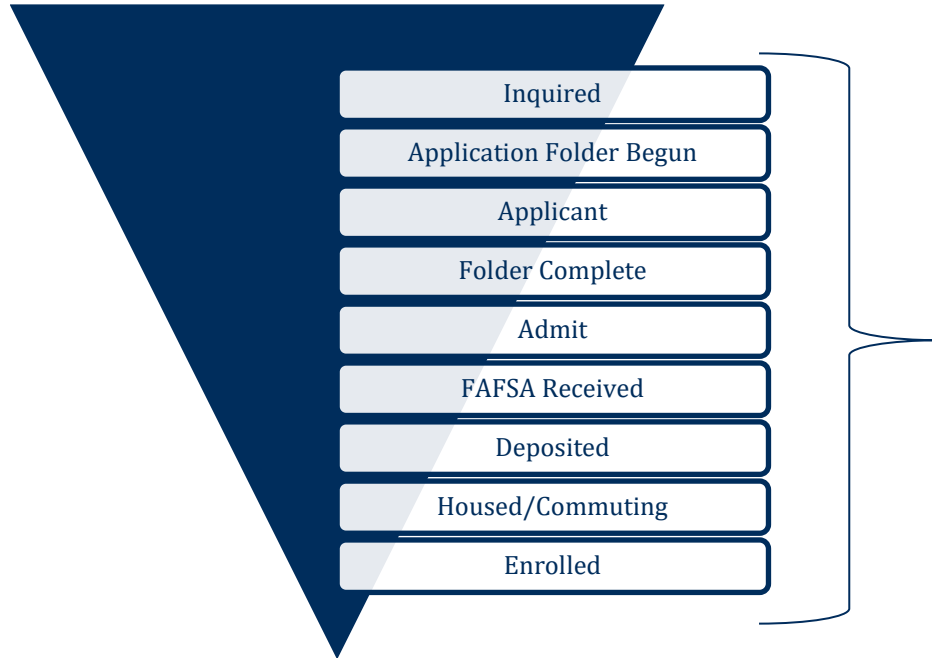


# They Don't Enroll If They Don't Apply

(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 banner is overlaid across the middle of the image.

**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, ornate stone arches supported by columns. In the background, a large, multi-story building with a central dome and a spire is visible, surrounded by trees and a green lawn. The overall scene is a classic university campus setting.

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



# Tracking It All

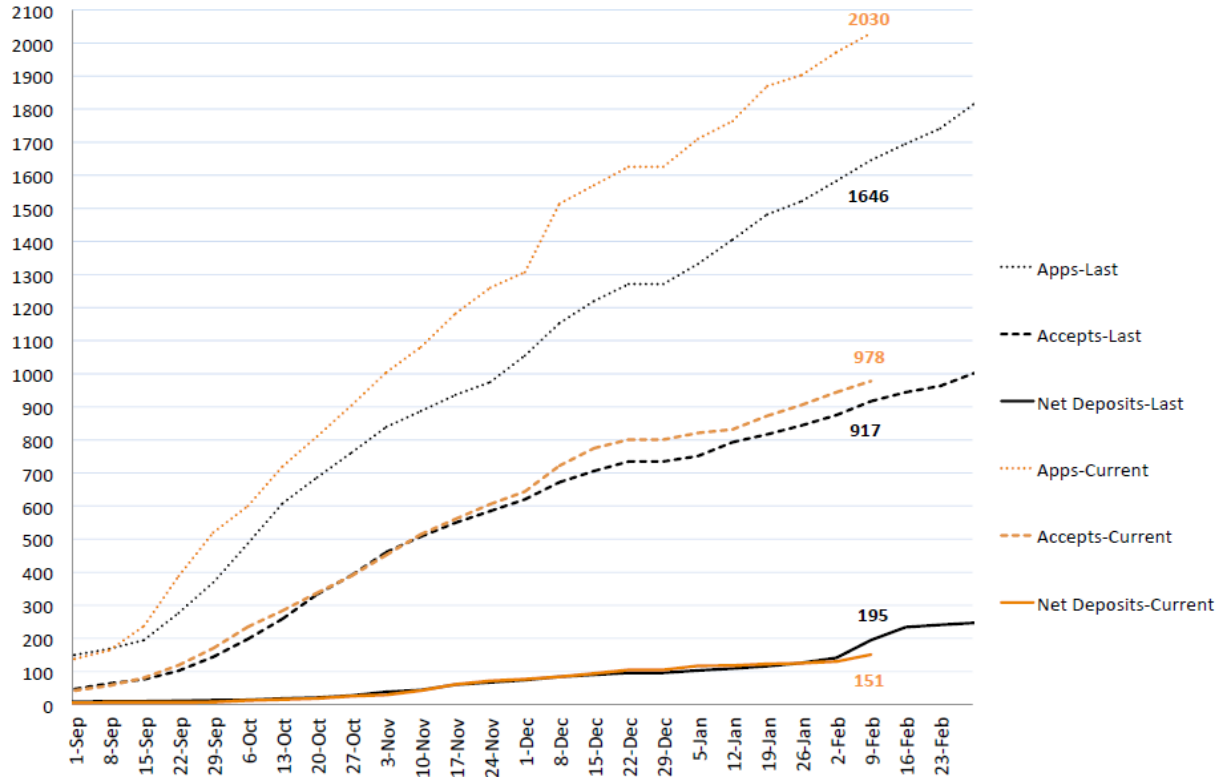
## Weekly

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

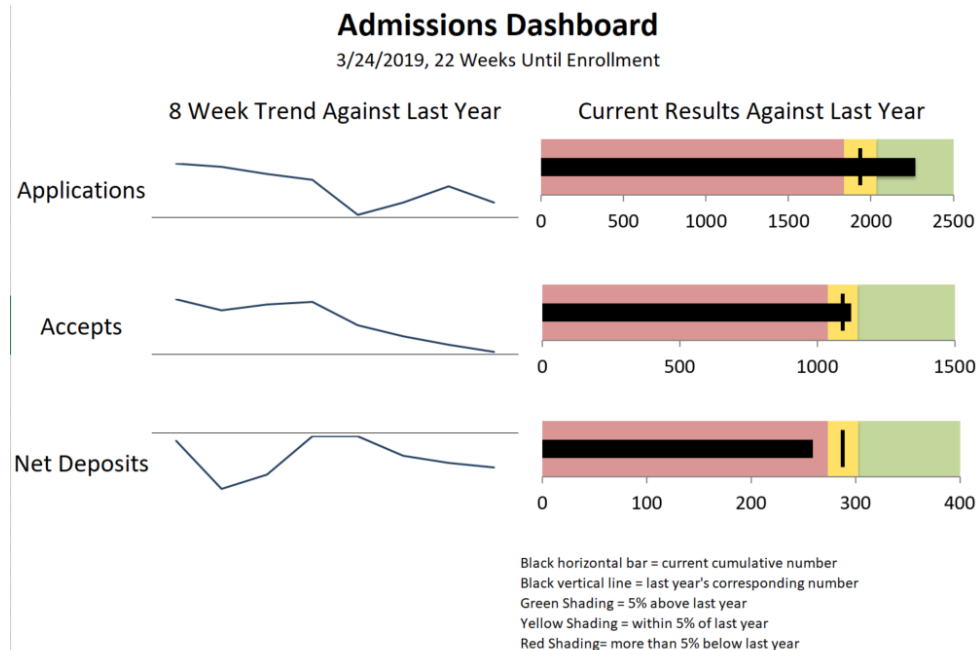
## Reporting Out to “The Other”

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



# Tracking it All

## Reporting Out to “The Other”

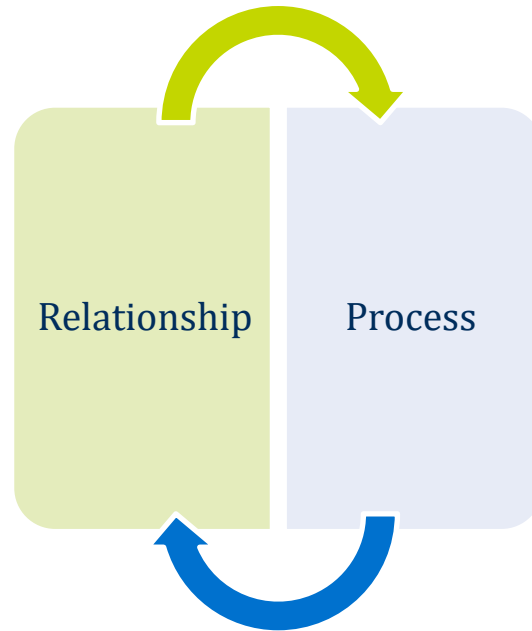




Keeping It  
Healthy:  
A Culture of  
Discipline  
(and Care)



# Knowing Why We Do What We Do



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





**The purpose of measurements and goal setting is to create a culture that facilitates a food 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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# Keeping Staff Focused

*Activity Stats: Primarily for Guidance. Rarely Punitive.*

Counselor Territory Stats	Weekly Goal	Weekly Actual	Difference	Cumulative Goal	Cumulative Actual	Difference				
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Saturday	0	0	0				→			
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 stadium with rows of grey seats and a central aisle leading to stairs. A blue horizontal band is overlaid across the middle of the image, containing white text.

**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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