

ADVISOR RECRUITMENT: A CASE STUDY

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Why the 3 step model?

- Colony advisor placement has generally been successful in recent years.
 - 5-person advisory team
 - Talent continually evaluated during first several months
- Can the colony recruitment strategy work at an established chapter?



Background on the chapter

- Cons

- Moderately isolated geographically
- Historically distant relationship with General Fraternity
- Past chapter leadership demonstrated insular behavior (except in response to alumni association board)

- Pros

- Very involved alumni association board (not local)
- New chapter leadership very willing to explore additional support structures





Create
buy-in

Generate
a **TARGET**
list

Work your
TARGET
list

Create buy-in

- When have you presented an idea or strategy in your professional life that was adopted successfully?



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- Feb 2007
 - Alumni association president attended NE *Keystone* (without chapter)
- March 2007 – June 2007
 - Several phone conversations (about one per month) to help plan a chapter retreat
 - Always leading conversation back to the need for local support



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- Result

- Alumni Association President recruited and offered two local leads for advisors
 - appointed in October of 2007



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- The following needs still weren't met
 - 3 advisors deficient of a full-team
 - Financial guidance was a top priority
 - Local presence still needed to be increased



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- Consider one of your chapters, what are the needs you face?



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- Meeting held with Greek Advisor, IFC advisor and Director of Student Affairs
 - **Result – 2 leads generated**
- Solicited chapter president (three times) for names of qualified faculty from chapter members
 - **Result – 7 leads generated**
- Re-engaged an advisor that walked away due to lack of communication by the previous leadership
 - **Result – 1 lead generated**
- Contacted Alumni Association President again and pressed him for more leads
 - **Result – 5 leads generated**


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Work your TARGET list

- First Solicitation
 - Sent 12 emails to potentials
 - Made 3 cold calls (didn't have email address)
 - **Result – 8 positive responses that wanted to learn more**
- Second Solicitation
 - Made 8 follow up calls to set face-to-face meetings
 - **Result – 6 face-to-face meetings scheduled**



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Work your TARGET list

- Third Solicitation
 - Held face-to-face meetings (with chapter president present)
 - Dean of Students, Asst. Vice President of Business Operations, community Police Officer, career counselor and chapter alumni
 - **Result - 4 new leads generated**
 - **Result – 2 potential advisors**



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- What is your plan of action?



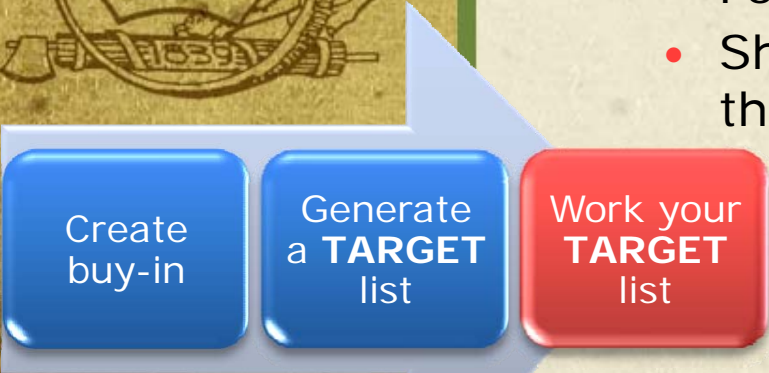
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Work your **TARGET** list

- Hand written thank you notes were sent to all persons I connected with.
- Met face-to-face with chapter counselor to discuss the need to welcome the new advisors and show appreciation.
- Held a conference call with the DC and CC to discuss top priorities.
 - Follow up with additional leads.
 - Show appreciation to new advisors (because the chapter still struggles with this)



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Work your **TARGET** list



Total time invested

- Estimated time invested
 - 4 hours of time spread out over 3 weeks
 - Initial emails, phone calls, meeting prep time
 - One full day of visits on-site
 - Face-to-face meetings
 - 3 hours of follow up work
 - Thank you notes
 - Transition conference calls



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Results

- Potential of 4 advisors placed in one-year time frame
- Several additional leads generated
- Increased relationship between chapter, university and General Fraternity
- Increased understanding and buy-in of Beta Theta Pi by alumni and university



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