



# KEEPING ADMISSIONS COUNSELORS ACCOUNTABLE

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# INSPECT AND QUESTION

So much institutional success, not to mention our own, is wrapped up in admissions counselors being proactive and thorough professionals.

- Are we doing enough to help these staffers be as impactful as they can be?
- Are we holding them accountable for their contributions?
- How can we better measure and communicate both high and low performance?
- Has the pendulum swung too far in the wake of the walk back from incentive based recruitment?



# RESPONSE

- Admissions Counselor measurement and productivity are vital pieces to executing yield strategies. This session will demonstrate a number of key ways to measure and maintain productivity from both the data and staff management sides of the equation.
- Participants will learn how to combine CRM utilization, reporting, and benchmarks to embrace a data-driven culture that can lead to higher productivity and accountability.
- Through a deliberate process spanning almost a decade, Oklahoma State University has developed effective ways to hire, train, benchmark and hold accountable admissions counselors who are accustomed to being measured - all within the bounds of our industry's ethics and good practices.



## LEARNING OUTCOMES

- Identify and execute better metrics of admissions counselor outcomes and productivity.
- Understand how embracing a data-driven culture can drive the success of recruitment teams.



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# OKLAHOMA STATE UNIVERSITY



## Land-Grant Research University

- Founded in 1890
- Main campus in Stillwater, OK

## 25,000 students

- 80% undergraduate
- 20% graduate
- Fall 2017 freshman class: 4,220

## Undergraduate Admissions

- Comprehensive office
- 65 full-time employees
- Rolling admissions



## NATIONAL LANDSCAPE

- Enrollment and net revenue
- Hiring and onboarding of admissions counselors
- Technology
- NACAC Statement of Principles of Good Practice



## OSU LANDSCAPE

- Enrollment and net revenue
- Hiring and onboarding of admissions counselors
- Technology
- NACAC Statement of Principles of Good Practice



# KEEPING ADMISSIONS COUNSELORS ACCOUNTABLE

## OVERVIEW

- Hiring
- Training
- Goals and benchmarks
- Measurement



## HIRING FOR ACCOUNTABILITY

- Job descriptions
- HR friends
- On-campus recruiting
- Interview for accountability
- Recruit your candidates



## JOB DESCRIPTIONS

- Clear, concise and mission-oriented goals
- Communicate expectations *and* environment
  - “This position is accountable for enrollment growth...”
  - “Varied and fast paced customer/client focused environment”
  - “Team oriented and individual accountability...”
  - “Monthly and yearly accounting for productivity...”
  - “High level of independence combined with data-measured accountability...”
  - “A high level of teamwork and collaboration...”
  - “Periods of independent work...”
  - “A goal driven team player with a strong work ethic is likely to be successful...”
- Work HR job posting system–posted by date? Alphabetical?
- Position title: “admission counselor” gets “counselors” to apply
- How is salary communicated: range? “commensurate?”



## MAKE HR FRIENDS

- Make friends with your HR partner
- Ask them questions, seek their help
  - “Who has the best hiring practices on campus?”
  - “How can we use the hiring system more effectively?”
  - “Where should this position be posted?”
  - Trainings: interviewer skills, HR landmines, first 90 days
  - Act as “hiring consultants” to evaluate your practices
- HR partner not a great resource? Need a new one?
  - “Who in HR has a great history of helping departments hiring to skill set?”



## ON CAMPUS RECRUITING

- Majors with skills that align with departmental goals (Agricultural Communications)
- Your student staff (tour guides)
- Other student staff (college ambassadors)
- Recruit current students not “recent grads”



## LIKELY CANDIDATES\*

- Demonstrated history of being measured
- Competitive nature
  - “What accomplishment are you most proud of?”
- Experience of working towards a goal
  - Strong Boy Scouts, FFA, athletics backgrounds
- Experience that has a history of tough fit in your organization?
- Polished materials: résumé, cover letter, references, etc.

\* Looking for those who like to be measured, not accounting for culture or fit



# INTERVIEW FOR ACCOUNTABILITY

- **Interview Structure: phone or skype and/or in-person**
  - Does your interview structure positively project your organization?
- **Questions for the candidate that get to accountability**
  - “When have you taken responsibility for something?”
  - “Tell about a time your performance was publicly/openly discussed...”
  - “Tell about a time when you lost a close game or had a hard loss...”
  - “How did you react to that loss?”
  - “What do you think your current supervisor would say about your work ethic?”
  - “What example do you think he/she would point to?”
  - “Tell us something about yourself we haven’t talked about today?”
- **Listen to responses rather than wait to ask next question**
  - Ask pointed follow-up questions that get to outcome of example
  - React and respond to the interviewee’s remarks



# WHEN YOU FIND'EM, RECRUIT'EM

- *Recruit* your candidates
- Communicate salary *and* benefits
- Streamline offer process (verbal first)
- HR partner as “recruiting partner”
- “First Day” perks



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# TRAINING FOR ACCOUNTABILITY

- Training plan
- Shadowing and partnered activities
- 90-day review



## TRAINING PLAN

- **Four-week training plan: “two on, one off, one review/revisit”**
- **Three scheduled one hour-long training sessions per day**
  - Additional “to be scheduled” trainings
- **Daily morning and afternoon check-in with supervisor**
  - Review specific trainings and issues, rescheduling needs, assess
- **Inquire with trainers**
  - “Did they get out of your training what they need?”
- **Train data reporting and CRM over several sessions**
  - Session focused on individual measurement
  - Review data methods and sources
  - “Recruitment Best Practices” involving CRM and Data



## SESSION EXAMPLES

### 11:00 a.m. – 12:00 p.m.

- Progress Report Training with *Joe Gray & Casady Bowman* (Conference Room – 324 SU)
  - Strategies and opportunities to find efficiencies with data analysis tools
  - Progress Report training
  - IRIM

### 12:00 p.m. – 1:00 p.m.

- Lunch

### 1:00 p.m. – 2:00 p.m.

- Observe/Shadow Front Office with *Candice Cheesman*

### 2:00 p.m. – 3:00 p.m.

- Slate II with *David Mariott & Casady Bowman* (Conference Room – 324 SU)
  - Building and Running Queries
  - Slate Inbox
  - Events & Recruitment Calendar
  - Scheduler



# SHADOWING FOR GOOD

- Build shadowing into training plan
- Shadowing in two stages: observe and be observed
  - Formalize review and feedback in *both* stages/directions
- Partnered visits, outreach, campus tour presentation
- Train/guide seasoned staff on shadowing outcomes
  - “They should be as good as you by the time you are done...”
- Pair up new hires with desired traits and habits
  - Who has a great handle on effective outreach?
  - Who can explain CRM best practices for daily habits?
  - Who does the best presentation?
  - Whose behavior should emulated?



## 90-DAY REVIEW

- **Meet privately with all new hires**
  - Prior to their 90-day employment anniversary
  - Address performance, seek feedback, reinforce expectations
- **Ask them to assess their onboarding**
  - Do they feel prepared to be successful?
  - Do they foundation of new skills to use?
  - Who hosted great trainings?
  - Where are there gaps?
  - What are the areas for additional training?
- **Assess training plan effectiveness**
  - Were they set up for success?
  - Did the plan get executed effectively?
  - Did the trainers uphold their responsibility?
- **Were expectations accurately and effectively set?**



## GOALS FOR ACCOUNTABILITY

- Clearly defined, transparent, and aligned goals
- Data-driven with quantitative and qualitative indicators
  - Review institutional data trends
  - Engage key stakeholders to understand broader contexts
- *Aspirational* and *Obtainable*
- Balancing the fine line between *Motivating* and *Discouraging*



## OSU GOALS

### Overall Goals

- Expectation for enrollment growth
- Top-down approach to identify overall recruitment goals

### Territory-Specific Goals

- Territory enrollment goals represent proportion of previous class
  - Territory 1 achieved 10% of last year enrollment; goal would be 10% of new overall goal
  - Sets positive goals despite declining enrollment/missed goals
- Territory application and admit goals use territory-specific conversion (application to admit) and yield (admit to enroll) trends



## BENCHMARKS

- **Why Benchmark?**
  - Helps focus counselors on immediacy of responsibilities
  - Makes the process more manageable and to avoid “coasting”
- **Established Goals Set at Specific Time Intervals**
  - Counselor should reach X% of goal by X date to ensure achieving overall goal
- **Territory-Driven**
  - Set up at app/admit benchmarks by month based on previous territory trends
  - Separate benchmarks for each measure



## MEASUREMENT FOR ACCOUNTABILITY

- Strategic Progress Report as a comprehensive measurement tool and process
- One document per territory that includes both quantitative territory progress as well as qualitative context and perspectives
- Monthly review process that integrates various teams and partners across organization:
  - Data Upload and Review from Data Management Team
  - Initial Review by Admissions Counselor
  - Strategy Planning and Accountability with Counselor and Supervisor
  - Distribution of Individual Progress Reports to Enrollment Management Leadership



Month: **May**

**Quick Territory Snapshot**

Applicants to Date	1 Year Change	% 1 Year Change	Admits to Date	1 Year Change	% 1 Year Change	Overall % Change in Apps	Territory % Diff from Overall
<b>283</b>	<b>-5</b>	<b>-2%</b>	<b>242</b>	<b>-4</b>	<b>-2%</b>	<b>4%</b>	<b>-6%</b>

**Final 2018 Freshman Goals**

Applicants	Admits	Enrolls
<b>###</b>	<b>###</b>	<b>###</b>

**Final 2018 Territory Goals**

Territory	Applicants	Admits	Enrolls
<b>Terr. 1</b>	<b>299</b>	<b>250</b>	<b>77</b>

**2018 Progress Towards Territory Goals**

Territory	Current Applications	Current Admits	% of Apps To Date	% of Admits to Date	Expected Apps to Date	Expected Admits to Date	Expected % Apps to Date	Expected % Admits to Date
<b>Terr. 1</b>	<b>283</b>	<b>242</b>	<b>95%</b>	<b>97%</b>	<b>297</b>	<b>249</b>	<b>99%</b>	<b>100%</b>

**Applicants**

		2015	2016	2017	2015	2016	2017	2018	1 Year	% 1 Year	2 Year	% 2 Year	3 Year	% 3 Year
		FINAL Apps	FINAL Apps	FINAL Apps	Apps to Date	Apps to Date	Apps to Date	Apps to Date	Change	Change	Change	Change	Change	Change
Territory 1	School 1	79	55	66	79	54	66	53	(13)	-20%	(1)	-2%	(26)	-33%
	School 2	34	36	46	34	35	46	33	(13)	-28%	(2)	-6%	(1)	-3%
	School 3	44	73	44	45	73	44	64	20	45%	(9)	-12%	19	42%
	School 4	19	19	25	19	19	25	26	1	4%	7	37%	7	37%
	School 5	17	17	22	16	16	22	18	(4)	-18%	2	13%	2	13%
	School 6	12	22	17	12	22	17	10	(7)	-41%	(12)	-55%	(2)	-17%
	School 7	31	29	20	30	29	20	22	2	10%	(7)	-24%	(8)	-27%
	Other Schools	35	53	48	35	52	48	57	9	19%	5	10%	22	63%
<b>Terr. 1 Total</b>		<b>271</b>	<b>304</b>	<b>288</b>	<b>270</b>	<b>300</b>	<b>288</b>	<b>283</b>	<b>-5</b>	<b>-2%</b>	<b>-17</b>	<b>-6%</b>	<b>13</b>	<b>5%</b>



## PROVIDING CONTEXT

- **The Numbers Only Tell One Part of the Story**
  - Differentiating between counselor who inherited well-managed territory vs. counselor whose numbers are down but are putting in the effort
- **Monthly Outreach Counts (telephone, email, text, in-person)**
  - Responsive and Proactive
  - Balancing Outcomes and Volume
- **Related Territory Responsibilities**
  - Fairs/Visit Schedule
  - In-office Coverage, Vacant Territory Assistance
- **Reflection & Strategy**
  - Guided Questions & Notes
  - Historical Progress Reports

### Territory Outreach Efforts

Territory	Campaign	Total Students Contacted	Total Students Contacted - Incomplete	Total Students Contacted - Complete	% Complete of Students Contacted	Ratio of Incomplete to Complete	Incomplete & Action Taken	Completed & Action Taken	Action Taken, Total	% Action Taken of Total Contacted	Ratio of Total Contacted to Action Taken	% Incomplete Action Taken	% Complete Action Taken	% Students Contacted by Phone
DFW1	Inquiry	0	0	0	N/A	N/A	0	0	0	0%	N/A	0%	0%	0%
	Applicant	36	27	9	25%	3.0	0	0	0	0%	N/A	0%	0%	0%
	Admit	85	66	19	22%	3.5	0	5	5	6%	17.0	0%	26%	0%
	Quality Admit	42	15	27	1	1	1	24	25	1	2	0	1	0
<b>Overall Total</b>		163	108	55	34%	2.0	1	29	30	18%	5.4	1%	53%	2%

### Additional Outreach

<b>Individual Phone Calls Made:</b>	617
<b>Individual Emails Sent:</b>	81
<b>Admitted Postcards Sent:</b>	56
<b>Total Additional Outreach</b>	754

### Admissions Counselor Guided Questions

**1. Looking at your territory's numbers from page 1, what context can you give for your numbers? How effective were you with your outreach, high school visits, college fairs, and general relationship building this past month(s)?**

The DFW 1 territory continues to prove challenging due to the small size. The territory is down 5 applications compared to last year and 4 admits. The territory is also down compared to the benchmarks (4% for apps and 2% for admits). So while the territory is not significantly down, it has still been concerning. I have contacted every single student in all campaigns each month. Being down in the territory is certainly not due to lack of effort or lack of outreach. Currently 86 students have cancelled their admission which is 36% of the admits. Most out of state territories have had between 20-25% of their admits cancel. This lets me know the students in my territory are engaged, but not planning to attend. COA and lack of scholarships has been the main reason for cancellations this year. Currently, there are 71 admit 5's which is 92% of the enrollment goal. I will continue working with students in the coming months.



# STRUCTURING MEASUREMENT

- **Successful Measurement Requires Organizational Commitment**
- **Culture**
  - Existing Data Analysis and Reports
  - Hiring, Training, Decision-Making
- **Technology**
  - OSU Implemented Slate CRM in 2012
  - Switching Strategic Progress Reports to SAS Viya for 2019 Cycle
- **Org Structure & Staffing**
  - Hybrid Recruitment/Data position during Initial Implementation
  - Currently Supported by Data Management Team



## KEY TAKEAWAYS

- **Hiring**
  - Construct hiring process that facilitates learning about candidate's accountability.
  - Look for those with demonstrated history of being measured
- **Training**
  - Train for measurement expectation and outcomes
  - Follow-up on training as accountability reinforcement
- **Goals and Benchmarks**
  - Aspirational and Obtainable at the Organizational and Territory Levels
  - Intentional Design to Assist Counselor Territory Management
- **Measurement**
  - Comprehensive Process as a part of Data-Driven Culture
  - Technology, Reporting, and Staffing Resources



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