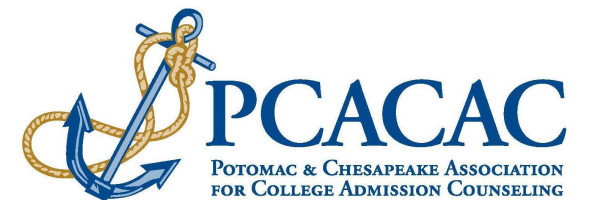


Welcome to the 21<sup>st</sup> Annual Summer Institute!

# The Art & Science of Territory Management

## Session B2

Monday, July 22



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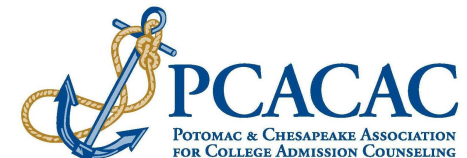
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# Learning Objectives

**Objective 1:** Explore the ‘Science’ of Territory Management – utilize data and resources to be efficient and effective

**Objective 2:** Sculpt the ‘Art’ of Travel – understand how to use personal preferences and interests to create a healthy travel season

**Objective 3:** Build Your Foundation – deepen appreciation for how relationships are essential to a successful career in higher education

# The 'Science' of Territory Management

## Understand the Data

- Schools & Students
  - Feeders & tiering
  - Specific programs, majors
  - Marketing & comms
  - Past, present, future opportunities

## Know Your Stuff

- Facts...blah blah – stories!
- Business cards, brochures
- Practice, practice, practice



# The 'Science' of Territory Management

## Planning Your Travel

- Build the outline, then fill it in
  - CRM and Geofencing
  - Google Sheets or Excel
- Use your tools and resources
  - Revisits, SCOIR, Maia, SignUpGenius
  - Call 'em up!
  - Maps, maps, maps



# The 'Art' of Travel

## Loyalty is a Virtue

- Maximize rewards programs
  - Airlines, Hotels, Rental Cars, Amtrak
  - Chain restaurants, coffee shops
- For hotels, multiple methods
  - Home base: one hotel for duration of trip, longer drives to schools
  - Jump around: new hotel every night, longer drive at night
  - Don't sleep on free breakfast (and maximizing per diem)
- Use your points!





# The 'Art' of Travel

## How to Travel Well

- Safety first
  - Reputable hotels, mindful of parking, lock car and hotel doors
  - Use your colleagues – walk together after fairs, socialize
- Self-Care
  - “Just one more visit!”
  - Emails, calls, texts while on the road
  - Advocate for office policies
  - Rest, food, logistics – eat local (and try to be healthy)
- See the sights!



# Foundational Relationships

## Counselors and Schools

- Be on time, and apologize when you're not
- Communicate, communicate, communicate
- Know your Independent Counselors (IECs) and Community-Based Organizations (CBOs)

## Students

- Be friendly, informative, excited, honest
- Have grace and patience
  - They'll rarely reply quickly (or submit their app on time)





# Foundational Relationships

## Parents

- Whether helicopters or snowplows, parents just as important as students
- Understand their underlying issues
  - College is stre\$\$ful
  - Societal pressure to find “perfect” school
  - Protecting their student
- Honesty and authenticity about what you can (and cannot) do
- Listen to them vent, stay calm, have thick skin
  - Many times, issue is far above your pay grade



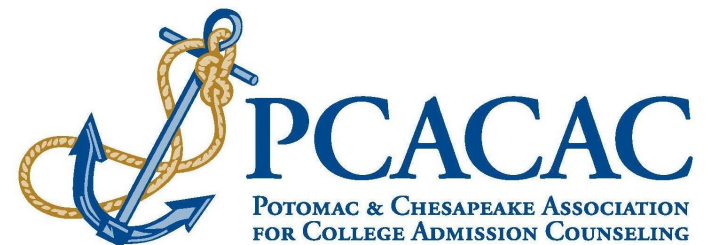
# Audience feedback time (aka QUESTIONS)

Comments?

Insights?

Input?

Information gaps?



# Please. . .

Complete the session evaluation on the Webex Summer Institute app before leaving the room today.

Thank you!

