

VALUE BASED ENROLLMENT METHODOLOGY WORKBOOK

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ValueBased

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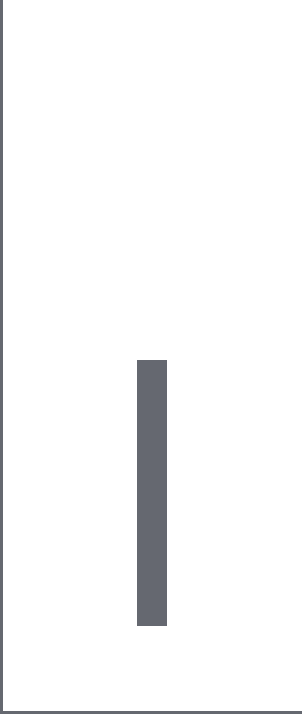
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WELCOME



INTRODUCTION

WELCOME

Welcome to the Value Based Enrollment Methodology. This course is specifically tailored for higher education institutions that use, or wish to use, an integrity-based, highly relational, consultative sales methodology to represent their college or university to prospective students and their constituents.

This curriculum can be completed as part of a live seminar/workshop; an online course; or a blended course offering both a live and an on-line learning experience together. This course is designed to reinforce all learning channels—auditory, kinesthetic and visual—as well as to offer flexibility in how a learner might experience it. The curriculum includes 14 modules:

Module 1: Representing the Value(s) of Your School

Module 2: Long-Term Vision

Module 3: The Service-Centered Counselor

Module 4: Buying and Sales Cycles

Module 5: Enrollment & Personal Goal Setting

Module 6: Establishing Trust and Confidence

Module 7: Telephone Techniques and Email Etiquette

Module 8: Qualification I: People, Time and Money

Module 9: Qualification II: Identify and Manage Issues

Module 10: Establishing Value

Module 11: Value Based Representation

Module 12: Objections: Opportunities To Represent Value

Module 13: Value Based Summarization

Module 14: Value Based Closing

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1

MODULE 1

REPRESENTING THE VALUE(S) OF YOUR SCHOOL

MODULE 1

MODULE 1

REPRESENTING THE VALUE(S) OF YOUR SCHOOL



INTRODUCTION

In higher education the Counselor assumes the role of a *consulting agent* to the student/constituents.

A SERVICE-CENTERED COUNSELOR

The Counselor *always* recommends what's best for them.



INTRODUCTION

Designed specifically for educational institutions that wish to use a consultative approach to represent their school.

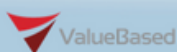


MODULE 1

SALES – AN ART OR SCIENCE?

ART
How you **present** the
value of your school

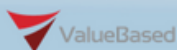
SCIENCE
How you **prove** the
value of your school



VALUES & VALUE

VALUES . . . of all parties.

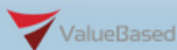
VALUE . . . of your school.



GOALS OF EIP (ENROLLMENT IMPROVEMENT PROGRAM)

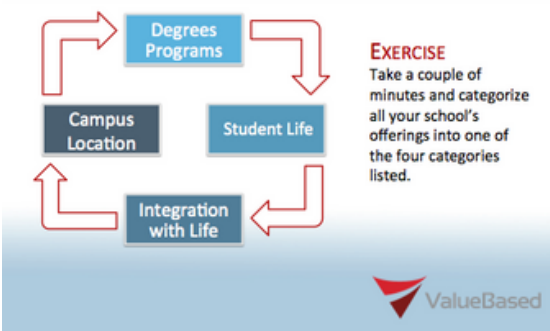
To articulate and message the value for each school's culture, community, and curriculum.

To justify a student/constituent's investment.



MODULE 1

YOUR OFFERINGS



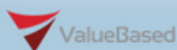
YOUR OFFERINGS

EXERCISE 1B.

List the differentiators that position your school apart from the other schools you are most often compared to.

EXERCISE 1C.

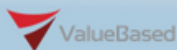
Rate your and schools ability to articulate & sell (represent) value.



The goal of the EIP is to provide a process to discover and establish the value for each of your school's offerings.

People make investment decisions based upon perceived value

Value-based concepts are no longer optional but should be considered essential.



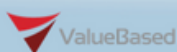
MODULE 1

THE METHODOLOGY

Determine what procedures work best for your institution.

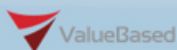
Develop and execute best practices/processes within your department.

Make adjustments until your desired results are attained - *implementing a process is a process.*



THE BOTTOM LINE

Most colleges/universities can benefit from implementing some consultative sales practices/processes within their revenue responsible departments.



MODULE REVIEW

The admissions process is both an **Art** and a **Science**.

PRESENTING value is the art of admissions.

PROVING value is the science of admissions.



MODULE 1

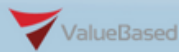
MODULE REVIEW

Two perspectives on value:

Values of all parties involved.

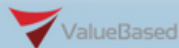
Value of your school.

Students/Constituents look at
WHO they invest in as well as
WHAT they invest in.



REFLECTION & ACTION ITEMS

Complete the Reflection & Action Items portion of
Module 1.



EXERCISE 1-A

Categorize The Offerings & Services of Your School

Degree Programs (Grad, undergrad, professional schools, etc):

Student Life:

Integration With Life (Intern programs, on/off campus job opportunities, etc.):

Campus Location (Geographic, climate, online, attractions, etc.):

Other (Athletics, food services, class sizes, etc.):

EXERCISE 1-B

List Your Institution's Differentiators

List the things that differentiate, or position, your school, its offerings and services apart from alternatives that your prospective students/constituents consider:

1: _____

2: _____

3: _____

4: _____

5: _____

6: _____

EXERCISE 1-C

Rate Yourself & Your School

Rate your and your school's ability to articulate & represent value (0 being not at all and 10 being all the time)

Your ability = _____

Your school's ability = _____

REFLECTIONS

In the space below please list any items you would like to further reflect upon:

- 1) _____
- 2) _____
- 3) _____

In the space below please list any items you would like to act upon:

- 1) _____
- 2) _____
- 3) _____

2

MODULE 2

LONG-TERM VISION

MODULE 2

MODULE 2

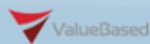
LONG-TERM VISION



INTRODUCTION

Other sales training are a rehash of old ideas, conjecture, and theatrics to convince people to buy, attempting to appeal to your intellect.

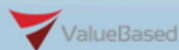
VBEM includes common sense, wisdom, and time-tested methods and principles.



The goal of the EIP is to provide a process to discover and establish the value for each of your school's offerings.

People make investment decisions based upon perceived value

Value-based concepts are no longer optional but should be considered essential.

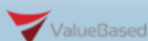


MODULE 2

HOW DO YOU DEFINE SUCCESS?

How would Jeff Bezos define success?

How would Mother Teresa define success?

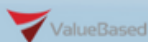


HOW DO YOU DEFINE EFFECTIVE?

Achieving your desired number of campus visits?

Obtaining your desired number of applications?

Attaining your goal of _____ deposited and enrolled students by _____ ?

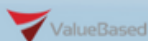


EFFECTIVENESS

Can be measured from outside ourselves – from our students and/or constituent's perspective.

Are they satisfied with our relationship?

Does my personality style match with theirs?



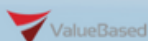
MODULE 2

EFFECTIVENESS

Have I listened with empathy to understand their issues and how they really feel about them?

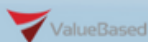
Are they satisfied with what they've learned and experienced with our school and its offerings?

Can we absolutely live up to the representations and commitments we've made to them?



LONG TERM PERSPECTIVE

Your effectiveness as a Value(s) Based Counselor is measured not only by your institution, your boss and yourself, but also from the prospective student/constituent's point of view.



VALUE BASED SELLING PHILOSOPHY

You will not be effective in the long-term at the expense of others. Only by serving others effectively, will you be effective.

Eventually win/lose scenarios turn into lose/lose scenarios.



MODULE 2

PEOPLE BUY FROM PEOPLE

Selling is a relationship business.

It is as much about representing yourself as it is about presenting your school.



EXERCISE 2-A

List five characteristics you believe are most valued in an Enrollment/Admissions Counselor:

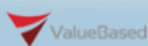
- 1) _____
- 2) _____
- 3) _____
- 4) _____
- 5) _____

MODULE 2

ACCORDING TO RESEARCH

80% of purchases are due to the trust and confidence prospects have in the person representing the product not just the product offering.

Source: Stanford Research Institute



PROSPECTIVE STUDENTS & CONSTITUENTS

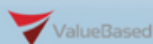
Evaluate you based upon how well you . . .

Listen and respond
to them.

Investigate their
needs and issues.

Demonstrate
empathy &
integrity.

Are fair, integrous
& trustworthy.



MOST VALUED COUNSELOR

Integrity

Empathetic
Listening

Honesty

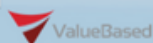
Service
Mindedness

Sincerity

Confidence

Respect

Fairness



MODULE 2

PROSPECTIVE STUDENTS & CONSTITUENTS

Evaluate us based upon . . .

Timeliness: Are we on time for appointments?

Follow-up: Do we consistently and patiently follow-up with them?

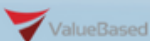
This method of representing your school is called
SERVICE-CENTERED COUNSELING.



MODULE REVIEW

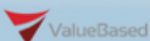
Focus on serving the student/constituent before their decision to attend our school.

Service-Centered Counseling allows you to gain a deeper sense of purpose and personal satisfaction.



REFLECTION & ACTION ITEMS

Complete the Reflection & Action Items portion of Module 2.



REFLECTIONS

In the space below please list any items you would like to further reflect upon:

- 1) _____
- 2) _____
- 3) _____

In the space below please list any items you would like to act upon:

- 1) _____
- 2) _____
- 3) _____

3

MODULE 3

THE SERVICE-CENTERED COUNSELOR

MODULE 3

MODULE 3

THE SERVICE-CENTERED COUNSELOR



INTRODUCTION

Leadership must be aligned and consistent with a service mentality.

This is best accomplished through “servant leadership” which also reinforces “service-centered counseling”.



INTRODUCTION

A service-centered counselor is aware of the **LAW OF RECIPROCITY** or the principle of **SOWING** and **REAPING**.



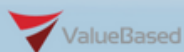
MODULE 3

A SERVICE-CENTERED COUNSELOR

Is highly motivated to serve.

Has a clear sense of purpose and strong motivation towards achieving their own goals.

Has and demonstrates integrity.

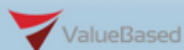


A SERVICE-CENTERED COUNSELOR

Demands excellence from themselves and those who work around them.

Are good listeners and practice active, empathetic listening.

Are not afraid to demonstrate true humility.



A SERVICE-CENTERED COUNSELOR

Recognizes the need for wisdom and uses their own insight and foresight seeking out those qualities in others – especially for important decisions.

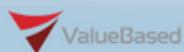
Does not allow fear and insecurity to rush decisions that should have further consideration.



MODULE 3

A SERVICE-CENTERED COUNSELOR

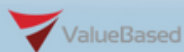
Does not depend upon titles or status symbols to position themselves above others.



EVALUATING SERVICE-CENTERED EFFECTIVENESS

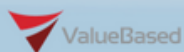
Do those they serve, prosper? Are those they serve better off having worked with you?

Is there evidence that their serving nature is caught and passed on?



EVALUATING SERVICE-CENTERED EFFECTIVENESS

Do the students and constituents you serve become more effective and equipped to make better decisions?



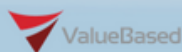
MODULE 3

THE SERVICE-CENTERED COUNSELOR MODEL

May take time for you to feel comfortable with it.

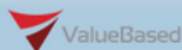
May have to deal with old paradigms.

Try picking one or two of the principles and try them.



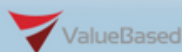
APPLYING SERVICE-CENTEREDNESS TO THE ENROLLMENT PROCESS

Primary job of a value based, service centered counselor is to provide students and constituents with enough value justification for them to remain committed to, and supporting your school for an extended period of time.



Students and constituents do not want to be sold something.

They prefer to invest in something that fulfills one or more of their needs.

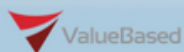


MODULE 3

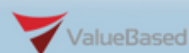
VALUE BASED ENROLLMENT METHODOLOGY HELPS

Determine what your student or constituent values and needs.

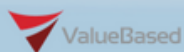
Demonstrate how to prove, or justify, the value of your offering.



If a counselor's performance is strictly measured by enrollment productivity there's a risk of leadership incenting the procurement of short-term, less satisfied students and constituents.



Today's counselor's should be incented to attract students that complete their degree and continue to support your school for years to come.



MODULE 3

REMEMBER

Not all students are the best fit.

There have been many reported cases of enrollments resulting from referrals from students who do not decide to attend the Counselor's school.



The Value Based and Service-Centered Counselor should strive to deliver more, rather than less, of what the prospective student/constituent is expecting.



EXERCISE 3A:

Take time to reflect on an experience you've had where you purchased a product/service that exceeded your expectations.

Describe what you were sold and what was delivered:



EXERCISE 3-A

In the area below describe a product/service you purchased that exceeded your expectations:

MODULE 3

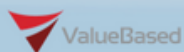
MODULE REVIEW

The Service-Centered Counselor

Bears a standard of excellence.

Embraces a role of servant leadership.

Wisely serves the needs of others.



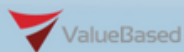
MODULE REVIEW

The Service-Centered Counselor

Do not compromise their
own principles.

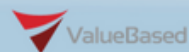
Meets their financial, professional, and
personal goals.

Improves the lives of others.



REFLECTION & ACTION ITEMS

Complete the Reflection & Action Items
portion of Module 3.



REFLECTIONS

In the space below please list any items you would like to further reflect upon:

- 1) _____
- 2) _____
- 3) _____

In the space below please list any items you would like to act upon:

- 1) _____
- 2) _____
- 3) _____

4

MODULE 4

BUYING AND SALES CYCLES

MODULE 4

MODULE 4

BUYING & SALES CYCLES



INTRODUCTION

Sales (Enrollment) Cycle

Is a series of selling activities that a salesperson moves through in representing their products and/or services to a prospective customer. The length and content of a sales cycle is dependent upon:

What is being sold

To whom it's being sold.



Some commercial organizations invest hundreds of thousands of dollars to research and develop selling systems that maximize their sales and serves ***their goals and objectives*** not necessarily those of ***their target markets or prospective clients.***



MODULE 4

Limiting our perspective to simply our “Sales Cycle” may cause us to believe that as salespeople we have some degree of control over the prospective customer’s decision-making (buying) behaviors.

The truth is, they rarely have the control they may think (or hope) to have over the buyer's purchasing process.



Associate enrollment activities to a corresponding set of buying activities conducted by the prospective student/constituent.

As Admissions Counselors, we conduct specific sales (enrollment) activities as a response to a need the prospective student/constituent has.

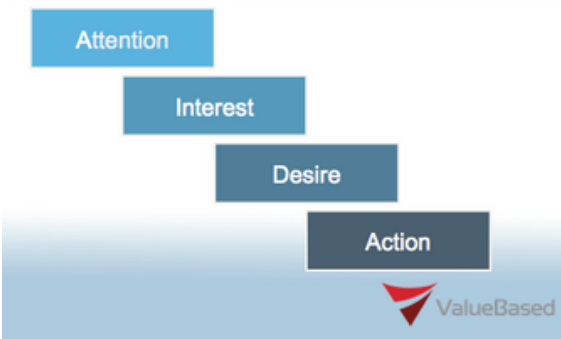


This perspective suggests that there is a **Buying Cycle** in addition to a **Sales (Enrollment) Cycle**.



MODULE 4

BUYING CYCLE – 4 STEPS



A – ATTENTION (BUYERS PERSPECTIVE)

- Something gets your attention
- You become aware of a need, problem or opportunity



I – INTEREST (BUYERS PERSPECTIVE)

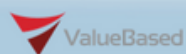
- Interest is high enough to motivate you to fulfill your need or opportunity
- Beginning to invest more time as it seems important to study it



MODULE 4

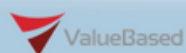
D – DESIRE (BUYERS PERSPECTIVE)

- Your desire for the Solution increases
- You can see the product/service addressing your need, problem or opportunity
- You can see what life is like after your Issue(s) have been dealt with



A – ACTION (BUYERS PERSPECTIVE)

- You know enough and are ready to act
- Make a choice to purchase one of your options



VALUE BASED SALES (ENROLLMENT) CYCLE – 5 STAGES

Prospect S/C

Qualification 1 & 2

Value
Representation

Value
Summarization

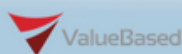
Close



MODULE 4

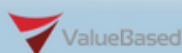
PROSPECT S/C STAGE

- Target audience identification and definition
- Market research and analysis
- Web-based search advertising
- Social media
- Public relations
- College fairs, direct and email campaigns



QUALIFICATION STAGES 1 & 2:

- Q1 Requires - Discover People, Time & Money
- Q2 Requires - Discover Issues of the prospective student/constituents



QUALIFICATION 1: Discover P-T-M

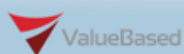
- Need to know ALL the People involved in decision (i.e. Students, constituents, other influencers)
- Need to know the Time frame when they will attend and make a decision (i.e. Fall term/semester, current or future year)
- Need to know if there is sufficient Money (i.e. Budget available, tuition & financial aid expectations)



MODULE 4

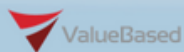
QUALIFICATION 2: DISCOVER ISSUES

- Must have an understanding of the students and/or constituents Issues (i.e. needs, desires, and opportunities)



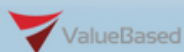
VALUE REPRESENTATION

- Presentations and experiential activities (i.e. College fair, High school, Jr. college presentations, etc.)
- Demonstrates how your school's offerings (i.e. Campus visits, videos, web conference calls, etc.) will meet the student's/constituent's specific needs and opportunities.



VALUE SUMMARIZATION

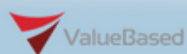
- Summarization of the cost, values and value of your school's offerings
- Presents both the value and the cost of attending your school
- To justify the expense



MODULE 4

CLOSE

- The prospective student makes the commitment to attend your school
- An enrollment and deposit decision is confirmed
- Does not have to be a stress and tension filled experience



CLOSE

- Should be a comfortable conclusion to a natural discovery and value based decision making process.

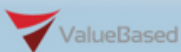


EXHIBIT A

Buying & Sales Cycle

BUYING CYCLE

SALES (Enrollment) CYCLE

Attention	Prospect
Students/Constituents (SCs) become aware that it's time to start thinking about if, when and where they will attend college. Peers and/or constituents share and dialogue on the subject and begin discussing and/or investigating alternatives.	College/university marketing departments identify target geographic and demographic markets. They begin executing coordinated digital, traditional and social marketing activities.
Interest	Qualification 1&2
SCs attend college fairs and conferences and meet with Counselors/Advisors to learn more about the available school options. SCs are assessing their financial resources and available sources of financial aid. They are researching college/university web sites and searching the web for scholarship opportunities. They seek advice from peers, friends, relatives, teachers, counselors and coaches.	Admissions Counselors (ACs) attend college fairs and conferences and respond to referrals and inquiries from their website. Questions like . . . is the student a member of our demographic; what are their and their constituents interests, passions, needs and desires; what major, program, or curriculum are they most interested in; and what value do they place on the answers to these questions are discovered.
Desire	Value Based Representation
SCs visit campuses and attend preview events. They meet professors, coaches, attend athletic events and sit in on classes. They compare the distinctives, curriculums, costs and communities of their alternatives and begin narrowing down their choices.	Individual campus visits are scheduled. Weekend campus group events occur. ACs involve other individuals and departments to assist in representing their school to the prospective student and their parent(s). FAFSA forms are submitted.
Action	Value Based Summarization/Close
SCs receive and evaluate college acceptance letters, financial aid packages, and scholarship offers. They weigh their research, advice and the decisions of friends and peers and make their final choice. They confirm their enrollment with their AC and send in a deposit check.	Acceptance letters and conversations occur. Financial Aid personnel and/or ACs present the prospective student's financial aid package to them. Using one or more closing questions and/or statements the AC asks the prospective student if they are ready to enroll and send in their deposit.

EXERCISE 4-A

Creating Your Sales (Enrollment) Process Map

Buying Stage (SCs Perspective)	Your Sales (Enrollment) Activities	Selling Stage (ACs Perspective)
Attention	Current State: <hr/> <hr/> <hr/> <hr/> Desired Future State: <hr/> <hr/> <hr/> <hr/>	Prospect
Interest	Current State: <hr/> <hr/> <hr/> <hr/> Desired Future State: <hr/> <hr/> <hr/> <hr/>	Qualification 1 & 2

EXERCISE 4-A

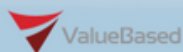
Creating Your Sales (Enrollment) Process Map

Buying Stage (SCs Perspective)	Your Sales (Enrollment) Activities	Selling Stage (ACs Perspective)
Desire	Current State: <hr/> <hr/> <hr/> <hr/> Desired Future State: <hr/> <hr/> <hr/> <hr/> <hr/> <hr/>	Value Based Representation
Action	Current State: <hr/> <hr/> <hr/> <hr/> Desired Future State: <hr/> <hr/> <hr/> <hr/> <hr/> <hr/>	Value Based Summarization/ Close

MODULE 4

MISALIGNMENT OCCURS WHEN . . .

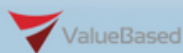
You become out of sync with the student/ constituent when one or more of you requests something that is out of the sequence of your selling (enrollment) cycle.



MISALIGNMENT EXAMPLE

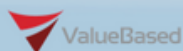
- You're evaluating a prospective student's academic qualifications
- Uncertain if they meet the minimum requirements
- At conversation end, prospective student asks for amount of tuition deposit
- Awkward tension results as prospective student is not officially accepted yet

Misalignment: Someone (buyer or seller) moves ahead or falls behind the other in your respective cycles.



YOUR RESPONSIBILITY IS TO . . .

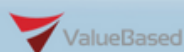
- Point out the discrepancy.
- Attempt to align both you and the student.
- Until all are on track, there will be tension in the relationship.
- Both of you expected the other to be in a different place or step in your respective cycles.



MODULE 4

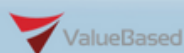
If misalignment is not corrected, the result is a breakdown in trust and confidence between one or both parties.

Remember, things work well as long as everyone is at the same stage, at the same time.



Coordination of buying & enrollment cycles may mean slowing down or speeding up the enrollment cycle.

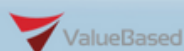
It's imperative that both parties agree to the importance of sharing information and to follow a parallel cycle in reaching the best selection decision.



MODULE REVIEW

Value Based Enrollment Methodology is about being prospective student and constituent-centered and not self-centered.

Consumers have preferred buying patterns that are reflected in their Buying Cycle.



REFLECTIONS

In the space below please list any items you would like to further reflect upon:

- 1) _____
- 2) _____
- 3) _____

In the space below please list any items you would like to act upon:

- 1) _____
- 2) _____
- 3) _____