* Attendees:
  + IUCG
    - Selvana
    - Sankalp
    - Spencer
  + BBBSEM
    - Aka

Next Steps:

1. Reach out to Kara from marketing
2. Send Email to Aka
   1. Link to program + project request
   2. SOW
   3. Collaterals
      1. Opp score
      2. Outreach slide deck
      3. Email templates

Takeaways:

* Recruiting to CRS pass off is not smooth, no intro
* Long term connections for recruiting are the best returns for BBBS
* They have a new CEE page and data management is making it hard for them to really use the campaigns to full capacity
* What do you want to know from us:
  + What is the strongest user experience flow that they should be grappling with?
    - Do they need so many questions
  + Most efficient best practices from interested to actual buyer?
  + Need to move towards an experience that feels good and is time efficient
  + A lot of up front time to get people into the funnel
    - What to grapple with to make it more fun and engaging
    - Get more people interested off the cuff
    - Hand off

Notes:

Aka

* Him and marketing are on the Community Engagement (CE) team
* Talk to Cara who is in charge of marketing
* Comms that go out to Bigs and Littles

Organizationals

* For profit and non-profit

Individuals

* Prospective
* Community leaders
* Champions who move the needle (Jesse Victoroff able to activate McK)
  + Org to org is communicated through the champs

Ambience comms

* LinkedIn, email, phone
* People who have shown interest but not taken steps

Comms: Goal to get the person to zoom or in person meeting, more valuable than email. Move from passive to active communication. Virtual and hybrid are still options.

* Ind emails
* Bulk salesforce email
* Bulk text
* Phone calls
* Social media

Automated processes: Recruitment to CRS carries torch to get person to book interview and carry torch to match

* Aka to nudge people day of recruiting event
  + Quickest outreach is the best or you lose people
* Templated formula for cadence of outreach from recruiting event
  + Doesn’t necessarily introduce CRS for handoff (not always necessary)
    - CRS customer relations is up to interview
    - Sometimes passed on all the way to enrollment (Caitlin)
  + Process that you move forward internally is not as defined as it might be
* Automated:
  + Not very clear but CRS should move someone on within 48 hours
  + Salesforce workflows connected to CEE pages

Event example

Google

* QR into salesforce
* Outreach post event
* Intensified outreach to book interview
* Nudge champ to push cohort to finish application

What are the costs associated with recruiting?

* Terry best lens
* In general, setting up a one off info session is very time consuming and not a big enough needle pusher event
* More effective is into idea of community impact pledge with a company (multi year) within framework, agree to certain # of events per year
* Step into other meetings within the company (pre existing)
* Reduces cost and time cost
* If you don’t do it that way, work with people who have not done something like that before
* Pipelines of around 50-60 orgs
  + Can predict how many bigs/events/inquiries from org
  + Fed by num of emp living in eastern mass
  + Algo spits out plan for how to get matches and how many
* Driver for metrics, but sometimes feels less non-profity

Opportunity Score for Companies:

* People, history, …...

Physical info at recruiting event:

* RSVP for event with QR code
* Slide deck in advance with QR code
* Followup email with QR code

Event to Form

* Want people to RSVP in advance to add them to campaign
* Change their status based on what they indicated (warm or cold lead), and start a different automated process
* For an event
  + In comm with anyone who RSVPed and the champion, and RSVP after the event
  + Should receive many communications after RSVP
  + Right after event, Aka sends email to those who have RSVPed, manual trigger by team
  + Change of status starts automatic flows
  + RSVP coming to event and also first page of application
    - Umassbigs.org/cee
    - Replica of the inquiry page and optimally all go to cee

Why doesn’t status process?

* New cee page, data management
* Funneling people better into different campaign
* Way more aggressive oureach 3wks-> 12 days

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**IN EMAIL:**

Link to program + project request

SOW

Collaterols

* Opp score
* Outreach slide deck
* Email templates