

An Insider's Guide:

MANAGING A LARGE CASELOAD

Your Speaker

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Our Agenda



Setting Expectations



Organization & Efficiencies



Planning & Time Management



Boundaries & Self Care

Setting Expectations

- Be clear
- Repeat your **expectations**:
 - Consultation (at a high level)
 - Getting Started Meeting
 - Application Process Kick-off (via multiple mediums: e-mail, 1-1 meeting, video, webinar, etc.)
- **Nip offenders early** in the process, reiterate expectations



3 Categories of Expectations (provided on a one-sheet)

1. **Communication**
2. **Meetings**
3. **Student Ownership**

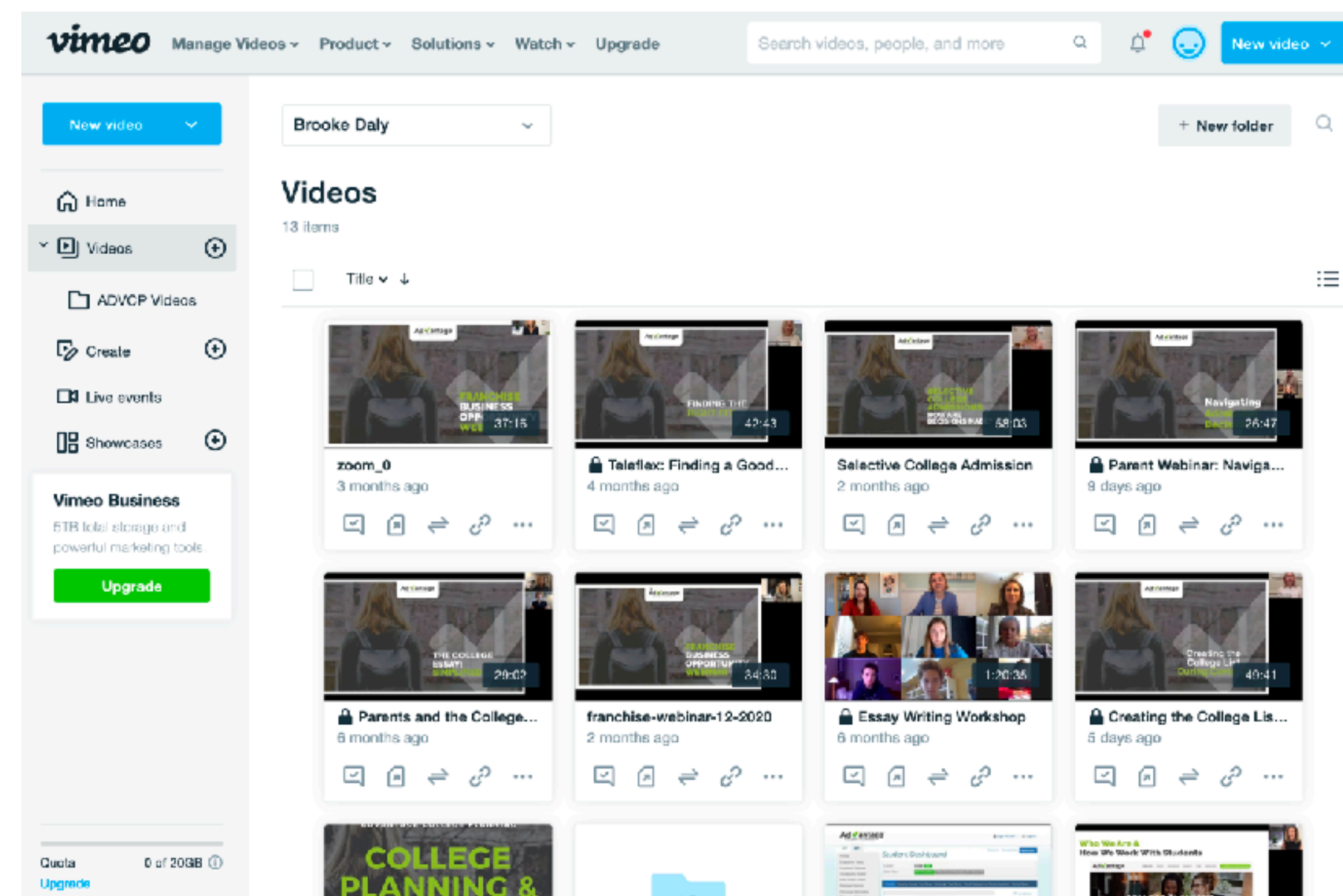
Sample Expectations

- No meetings for the sake of meeting. If you haven't had time to complete assigned homework, please reschedule (especially during the application process).
- Please stick to the timeline. If you can't, communicate so we can reassess.
- First drafts of college essays submitted within two weeks of the college application deadline may or may not be reviewed.
- No one will work harder than the student in this process. Then me. Then parents.

Organization & Efficiencies

Never write the same thing twice

- Multi-student to-do's
- Document library (write instructions for FAQs)
- Video library (vimeo, YouTube, etc.)



Organization & Efficiencies

Have a client communication plan

- What messages/emails do you send every year?
- Create a spreadsheet and for every month, include what messages you send and the vehicle you intend on sending it

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
30	31	1	2	3	4	5
			LOR Reminder Email			
6	7	8	9	10	11	12
			Send FAFSA Prep Email			
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	1	2	3
			Send FAFSA Opening Email			
4	5	6	7	8	9	10

Organization & Efficiencies

Workshops, Group Sessions, Webinars, and Video

- Efficiency in sharing message with a group vs 1-1
- Consider recording videos to cover topics like:
 - How to approach the “Why Us” essay
 - How to report your scores through the College Board
 - Etc.



Meeting Structure

Best Practices

Have a centralized place for all **meeting agendas** and **resources** you share with students

If a student hasn't done the work, **cancel the meeting** and have the student use the time to be productive

Use dictation for **meeting notes**, save them in software, and email them to parents

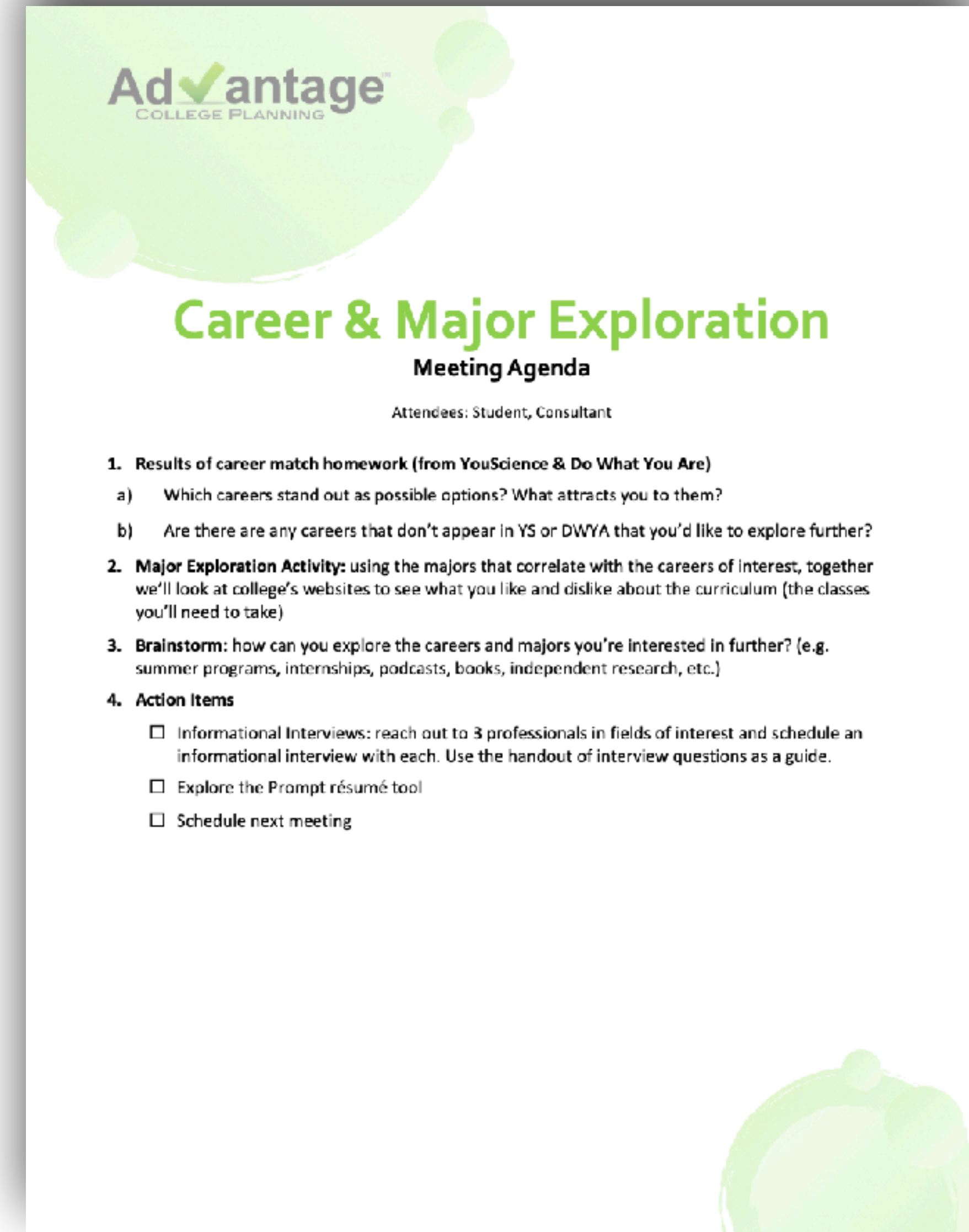
The screenshot shows a OneDrive folder interface. At the top, it says 'Advantage College Planning >' and 'Meeting Agendas & Resources'. Below the title, there's a link to 'Click here to describe this folder and turn it into a Space' and a 'Show examples' button. The main area has a '+ Create' button and a 'Paste' button. Below that is a table of folders with columns for Name, Modified, and Recent.

Name ↑	Modified	Recent
> Activity List	1/17/21, 11:22 am	--
> Admission Process Overview	11/12/20, 7:41 pm	--
> Campus Visit	3/3/20, 11:41 am	--
> Career Exploration (2 Meetings)	1/17/21, 11:23 am	--
> Choosing a Good Fit College	7/26/20, 4:19 pm	--
> Course & Standardized Test P...	7/26/20, 4:27 pm	--
> DWYA	10/20/20, 2:17 pm	--
> Essays	7/27/20, 9:54 am	--
> Getting Started	10/20/20, 2:17 pm	--
> Interviews	1/23/20, 2:14 pm	--
> Resume	11/12/20, 7:41 pm	--
> YouScience	10/20/20, 2:21 pm	--

Meeting Structure Best Practices

Create **agendas/outlines** for every meeting

Include **action items** for student, parent, and IEC



Advantage
COLLEGE PLANNING

Career & Major Exploration Meeting Agenda

Attendees: Student, Consultant

- 1. Results of career match homework (from YouScience & Do What You Are)**
 - a) Which careers stand out as possible options? What attracts you to them?
 - b) Are there any careers that don't appear in YS or DWYA that you'd like to explore further?
- 2. Major Exploration Activity:** using the majors that correlate with the careers of interest, together we'll look at college's websites to see what you like and dislike about the curriculum (the classes you'll need to take)
- 3. Brainstorm:** how can you explore the careers and majors you're interested in further? (e.g. summer programs, internships, podcasts, books, independent research, etc.)
- 4. Action Items**
 - Informational Interviews: reach out to 3 professionals in fields of interest and schedule an informational interview with each. Use the handout of interview questions as a guide.
 - Explore the Prompt résumé tool
 - Schedule next meeting

Consider Hiring



Essay editor



Bookkeeper

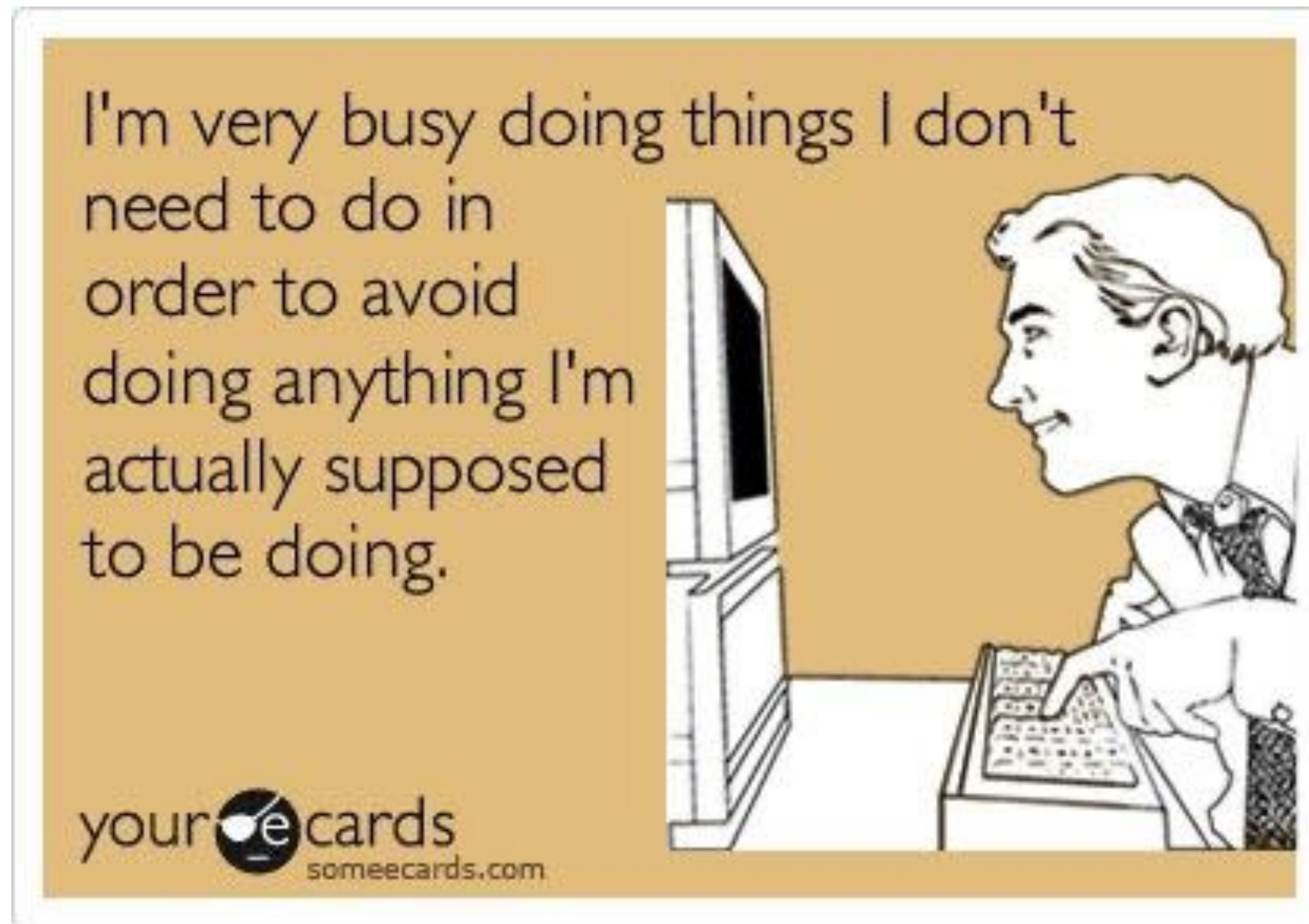


Researcher



Part (or Full) Time Consultant

Planning & Time Management



Set your intentions: for the year, month, and week

What do you want to accomplish by the end of the:

- Year
- Month
- Week
- Day



"Failing to plan is planning to fail."

Weekly Goals

- ✓ On Friday night, I would feel great if I accomplished...
- ✓ Block your time & eliminate distractions
- ✓ Switch up your work environment (or rearrange furniture)!
- ✓ Plan your week on Sun evening
- ✓ Check-in with students

Boundaries & Self-care

Trying to figure out when I can have that meltdown that I am entitled to...



your  cards
someecards.com

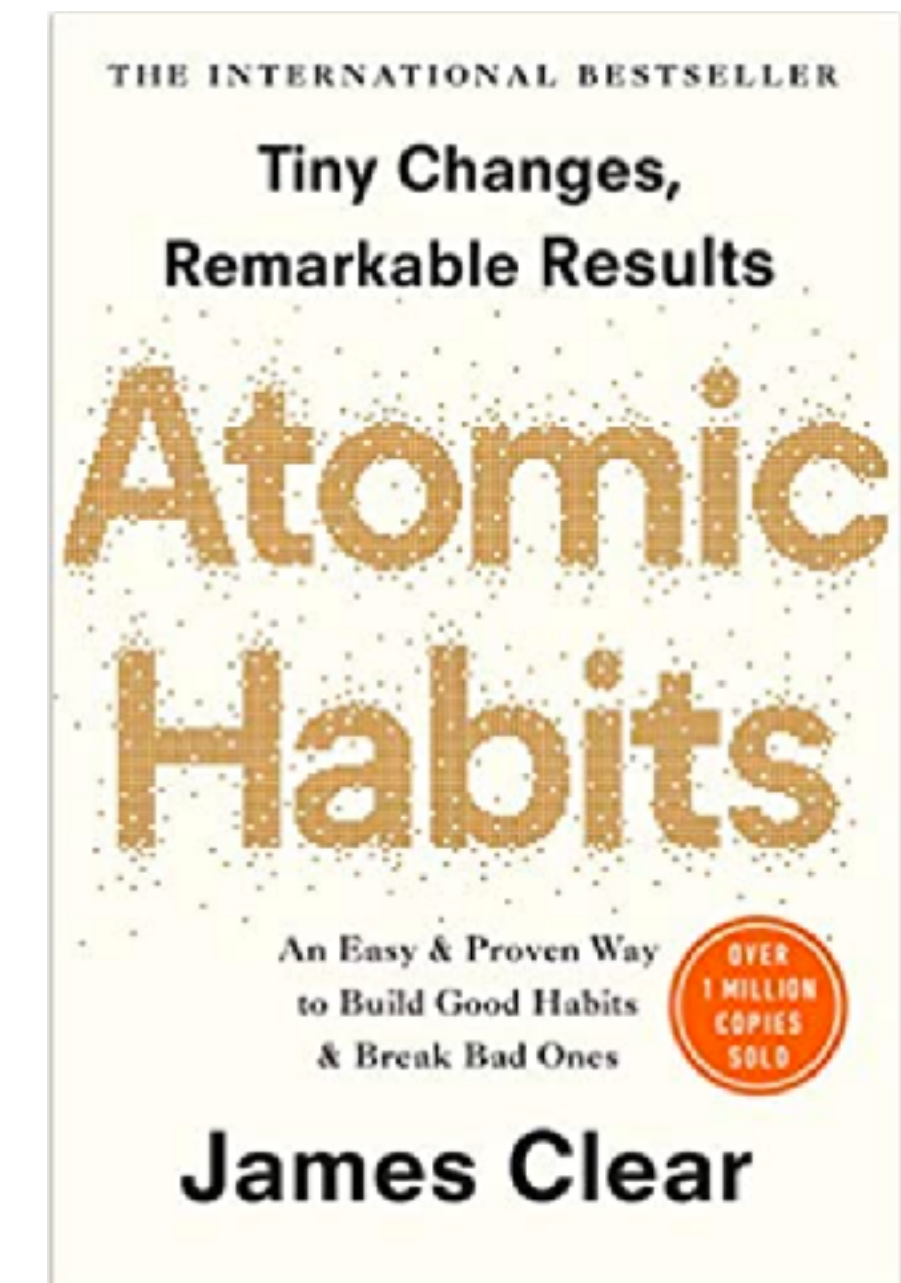
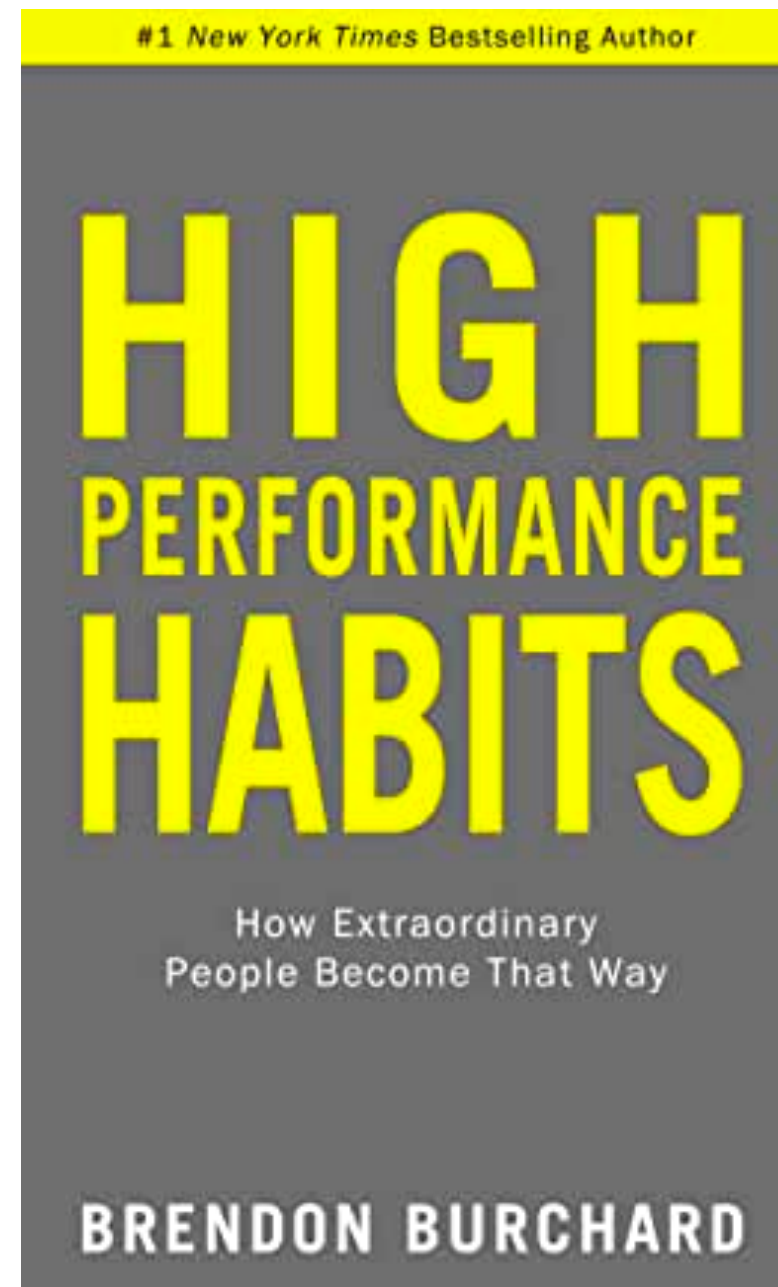
Boundaries & Self-care



- Try not to take on parent stress
- Use “level 2 listening”
- Set expectations
- Timelines/deadlines for essay feedback
- It’s okay to have a life (and go on vacation around Nov. 1)
- Reward yourself!

Resources!

InkWell Press





Questions?

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