

# COLLEGE PLANNING GUIDE

Student Name \_\_\_\_\_

Date \_\_\_\_\_ Advisor \_\_\_\_\_



▼ *Welcome the student and collect the completed Heald College Welcome Sheet.*



▼ *Review Welcome Sheet for pertinent info (concerns).*

▼ *Slide 2 is for visual use only, no need to read it out loud.*

## 1 GREETING

SLIDE 1

- ✓ Firm handshake and eye to eye contact
- ✓ Break the ice, help the student feel comfortable

## 2 RE-ESTABLISH RAPPORT

SLIDE 2

### **Statement of Purpose**

"The reason that we're here today is to explore your educational goals and how they relate to your career options. We can then determine if Heald is the right college for you. We also will be able to determine if you are a right fit for Heald."

"During our time together today, I'm sure you will have several questions for me and I will also have some questions for you. As we answer these questions together, we will then help determine the right program for you based on your educational background and goals."

"You will also meet with a financial aid advisor and he/she will help address your needs and develop a financial plan that is right for you."

"Part of my responsibility is to determine whether Heald is a good fit for you and if you are a good fit for Heald. If at the end of our meeting we have decided that it's a good match for both of us, and if you want to apply, I will recommend your application to my Director of Admissions for acceptance. If the College accepts you, I will do everything in my power to help you get started as quickly as possible. How does that sound to you?"

"Now I'd like to ask you some questions, so I can really get to know you, your needs and your goals."

**NOTES:** \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_



▼ Slide 3 is a great visual cue to cover info on this page.

▼ Why now? Why Heald?

▼ Allow the student to describe his/her situation, but you should ask detailed questions about his/her work situation.

▼ Reconfirm what is not helping them achieve their goals.

▼ Use follow-up questions like "How important?" and "Why?"

▼ High School, College, Training. Be sensitive to poor past experiences and take note.

▼ Ask the prospective student to "Paint a Picture" of their life with/without an education.

### 3 FOCUS ON NEEDS

SLIDE 3

This is the time when you should listen closely and try to uncover their real reasons for wanting to change their situation. You must uncover the prospective student's needs and reasons for wanting to look at college at this time in their life.

#### Remember:

- ✓ Their situation
- ✓ Their goals
- ✓ Ask questions
- ✓ Listen



**Remember to listen after each question and take notes.**

#### Recommended Questions:

##### EMPLOYMENT

###### Employed

- Hours \_\_\_\_\_
- Salary \_\_\_\_\_
- Benefits \_\_\_\_\_
- Career Path \_\_\_\_\_

###### Unemployed

- How Long \_\_\_\_\_
- Prior Experience \_\_\_\_\_
- Job Market \_\_\_\_\_
- Type of Work \_\_\_\_\_

##### EDUCATIONAL BACKGROUND

- Likes? Dislikes? \_\_\_\_\_
- Courses you were good at? \_\_\_\_\_
- Prior experience \_\_\_\_\_
- Did you finish? If not, why? \_\_\_\_\_
- How long have you been thinking about going back to school? \_\_\_\_\_
- On a scale of one to ten, (1 = most important) how important is education to you?  
\_\_\_\_\_
- How do you see your life with a college degree? Without a college degree?  
\_\_\_\_\_

## STUDENT NEEDS

- What is your best learning environment? \_\_\_\_\_
- How would you describe a great classroom experience? \_\_\_\_\_  
\_\_\_\_\_
- On a scale of one to ten, (1 = most important) rate each of the following:  
\_\_\_ Finishing school quickly  
\_\_\_ Flexible schedule  
\_\_\_ Hands-on learning  
\_\_\_ Small class sizes  
\_\_\_ Supportive learning environment  
\_\_\_ Lifetime career services assistance

## CAREER INTERESTS

- What's your ideal career? \_\_\_\_\_
- Do you prefer to work alone or with others? Why? \_\_\_\_\_
- Are you more interested in Healthcare, Business, Legal or Technology?  
\_\_\_\_\_
- How long have you been interested in \_\_\_\_\_?
- Who do you know in this field? \_\_\_\_\_

NOTES: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_



***If you have not determined the primary motivating factor and primary program of interest of this student, go back and ask more questions. Recap all of the reasons the student came to see us.***

## Motivations

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

## Concerns

1. \_\_\_\_\_  
\_\_\_\_\_

- Plan A
- Plan B
- Plan C

2. \_\_\_\_\_  
\_\_\_\_\_

- Plan A
- Plan B
- Plan C

3. \_\_\_\_\_  
\_\_\_\_\_

- Plan A
- Plan B
- Plan C

▼ *Recap is a restating of the student's situation. It's also letting them indicate agreement.*



▼ *The Heald College Program Sheets are the only approved career information documents (unless otherwise approved by CAO Career Services).*

▼ *Provide value by highlighting career opportunities.*

▼ *When referring to the Program Sheet, use a highlighter to emphasize key areas.*



▼ *Match benefits with student needs.*

▼ *Turn features into benefits.*

▼ *Matching our benefits to the student creates value.*

## 4

### PROVIDE EDUCATIONAL PROGRAM INFORMATION

SLIDE 4

#### **Program Sheet Review**

- **Recommend the proper program(s) and why**
- **Be sure to review all four sections of the Program Sheet**

##### 1. **Is it right for me?**

- ✓ Match skill set to program
- ✓ Provide examples

##### 2. **What's the outlook?**

- ✓ Discuss value and growth of program

##### 3. **What will I learn?**

- ✓ Generate excitement about program
- ✓ Match his/her ideal learning environment to Heald
- ✓ Mention sample courses listed

##### 4. **What will I do?**

- ✓ Highlight job titles on Program Sheet

**Salary expectations must not be discussed.** You must never quote a specific salary. If a student/parent insists on specific salary information, refer them to an external source like salary.com or the Bureau of Labor Statistics (bls.gov).

## 5

### PROVIDE COLLEGE INFORMATION



**Use PowerPoint to discuss section 5.**

#### **Heald Overview**

SLIDE 5

SLIDE 6

#### **The Heald Difference**

SLIDE 7

SLIDE 8

SLIDE 9

#### **Hands on training**

Allows the student the benefit of actual work experience while learning. **Many students learn better with this method. "Remember you said you learn better by hands-on type of training."**

#### **Small class size**

This enables the teacher to spend more time with each student in the class. **Generally improves the learning environment.**

### Tutorial assistance

Free tutoring is available to all students to help them be successful.

**Professional instructors with practical experience.** As a premier career college, it is important to have real industry experience. All Heald faculty have the required academic credentials to ensure that our students are well trained and ready to meet the requirements of their goals and needs of our employers.

### Career Services

Heald has a dedicated professional staff whose purpose is to provide career services assistance to Heald students and alumni. These services are available to graduates. Students can also use Career Services for part-time employment assistance while attending school.

### Completion in a short time

You can complete our programs in less than 2 years, which means you can utilize your education to **Get in, Get out, Get ahead®**. This really means you can get in, get out and then begin that career and earning a salary commensurate with your education sooner.

### Flexible scheduling

Most of our campuses offer morning, afternoon, and evening schedules depending upon the availability of classes. This makes it easy to schedule around a busy work schedule and other factors.

### Financial Aid for those who qualify

This means at Heald College those that qualify may receive financial assistance to help pay for their education.

### Provide Institutional Disclosures to student

1. Drug-Free Schools Annual Disclosure
2. Peer-to-Peer File Sharing Policy
3. Consumer Disclosure Information

SLIDE 10

## 6 PROVIDE STUDENT INFORMATION

**Utilize the upcoming tour, assessment, and FIA visit to address these key concerns. All students come to the interview with three concerns:**

1. **Can I afford it?** They must see an FIA Advisor and receive a financial plan or estimate.
2. **Can I do the work?** They need to be given an assessment on their first visit.
3. **Do I fit in?** They need to be given a tour on the first visit.

The goal is to address these three concerns for the student on the first visit.

▼ Utilize your campus Features and Benefits Sheet.

▼ Online classes are available to existing students for increased flexibility.



▼ Use the info you have gathered to discuss these three key concerns.

▼ Do not directly ask these three questions.

▼ The tour is the best time to illustrate our features and benefits.



- ▼ *While on the tour, address all concerns.*
- ▼ *Tell the Receptionist when you will be conducting a tour.*
- ▼ *Refer them to the Referral Gift program rules, including that they are eligible to receive only one token gift every 12 months and that token gift cannot exceed \$100 value. This is tracked closely at Heald.*



- ▼ *The closing statement must be presented with conviction.*
- ▼ *Call parents if applicable.*
- ▼ *Value must out-weigh cost concerns before discussing tuition.*
- ▼ *It is the job of the Advisor to fully disclose cost and to show the benefits of an education at Heald.*
- ▼ *Refer to F/A as financial aid when speaking to the student.*



## Assessment Opportunity

### 7 THE TOUR

Depending on your campus, the stations below may vary in terms of sequence.

**Station 1** – The lobby and/or hallways where your credentials are posted

**Station 2** – Learning Resource Center

**Station 3** – Class Rooms (empty and occupied)

**Station 4** – Student Lounge

**Station 5** – Student Referral Case

**Station 6** – Career Services

**Station 7** – Heald College personnel

**Station 8** – Financial Aid

**Station 9** – Receptionist / Admissions Assistants

**Station 10** – Director of Admissions

SLIDE 11

### 8 DECISION TIME

#### Closing Statement

“(Student Name), as we discussed early on in our meeting today, I indicated that what we needed to accomplish today was to be able to introduce you to Heald College and the benefits of an education at our campus. We also said that we would address all your questions and concerns and that I would ask questions of you on behalf of the College. We stated that after our meeting today, if you and I both agreed that Heald College was a good fit for you and you for Heald, and you decide to apply, that I would recommend your application today.”

“OK. Then, I would like to recommend you to my Director of Admissions for application. How does that sound?” (If the student indicated they would like to apply, then proceed).

#### Prepare the student to meet with our F/A staff:

“(Student Name), what do you know about the cost of an education? Our financial aid office will help explain what government assistance in the form of loans and grants you may or may not be eligible for. In the event that the government assistance does not cover the cost of attending Heald our financial aid staff will discuss other options for you including paying cash or alternative loans. Let me explain to you the cost of your investment.”

Quarterly: The cost of our program is \$\_\_\_\_\_ per quarter.

"How have you prepared to cover the cost of your educational investment?"  
*Pause for answer*

"The good news is that our financial aid department will meet with you today and present several opportunities to assist you in developing a financial plan that meets your financial needs. Everyday they assist students with their financial plans."

If Heald is a good fit for the student, they should be asked to fill out only the application (the first 2 pages of the Enrollment Agreement) at this time. If the student does not want to fill out an application, but still wants to see F/A, then we are obligated to help them see F/A at that time.

**If the student wants to complete an application:**

"If at this time you would like to complete an application for enrollment, I will fill out the rest of the information on my computer and then I will print the application for you to read and sign. I will then take a copy of this application to our financial aid advisors who will meet with you to help develop a financial plan that meets your needs."

**The only way a prospective student can fully determine if Heald is right for them is to meet with F/A. Once you have printed the application, introduce them to the Financial Section of the Enrollment Agreement.**

Be sure to discuss the program length and cost.

If they have concerns about attending school full-time or taking 16 credits, be sure to explain that they can choose to take less credits and this will mean that they are in school for a longer period of time. It is the student's choice, but a full-time (12 units/credits or more) schedule is expected. Students should be advised that any unit load less than full-time might also reduce their financial aid eligibility.

The Pricing Sheet is an internal document and is only intended to be used when filling out the 'Other Fees and Cost' portion of the financial section of the Enrollment Agreement. This document is not for distribution – it is ONLY for internal reference. The Pricing Sheet is to ensure that the Enrollment Agreement is filled out accurately and that all costs associated with the program and the estimated total program cost is discussed with the student.



**Assessment Opportunity**

Re-confirm his/her conviction. Avoid hesitation prior to taking them to F/A.

"Great! (Student Name), let me explain to you the steps we need to take in order to get you enrolled today and reserve a seat for you."

▼ *Briefing the F/A advisor about the student's needs and situation will assist the F/A advisor in developing a financial plan for the student.*

▼ *Students need to understand that they might have a loan payment while in school. Have they thought about how much they can afford?*

▼ *You should be clear about the cost of the program by quarter and the options available in terms of credits / units.*

▼ *Confirm the student understands that we enroll full-time as that's the fastest way to Get in. Get out. Get ahead.®*

▼ *Value is built by matching students with Heald benefits.*

▼ *Application = The first two pages of the enrollment agreement only without the School Administrative Official signature.*

▼ *Do not discuss specific F/A loans or make any commitment. This is the role of the F/A team.*

▼ *Make sure the student understands the value of education versus cost. Value must outweigh cost.*

▼ *If the student chooses less than full-time they should be aware that the amount of financial aid may be reduced.*



▼ *When completing the paperwork, use the standardized corporate approved enrollment packet and automated enrollment agreement (see DOA for required paperwork and how to complete).*

▼ *Do not make copies of copies. Use the automated enrollment agreement and original paperwork at all times.*

▼ *The recommendation is to prepare a file before each interview. Have all the documents ready to sign and ready to review. This is just good customer service.*

▼ *Be sure to fill out all necessary paperwork and ask for Referrals (see Step 10).*

## 2nd Interview Sign Off

*Signature*

# 9

## COMPLETE THE PAPERWORK

SLIDE 12

Upon return from F/A (and before completing the paperwork), the student needs to be okay with the monthly payments (if any). Does the student understand the loans and/or grants? If the student has additional questions, you will want to call the F/A advisor back in to answer any details.



Work with your DOA and make sure that your F/A advisor has done everything possible to help prepare a plan that meets the students needs. Your DOA can help you here.

“You have taken the assessment and done well. On the tour we saw many of the items that you said were important to you, such as \_\_\_\_\_ (i.e. small classes, hands-on training). You indicated that this was a good learning environment for you. We talked about how education and the opportunities it provides far out weigh the cost. You have met with Financial Aid and determined that you can afford to go to school, RIGHT?”

“OK. As I said earlier, if you and I both agreed that Heald College was a good fit for you and you for Heald, that I would help you apply and recommend you for acceptance.”

“Congratulations on your decision. Let’s complete the paperwork and get this process moving, OK?”

DOA should conduct a second interview at this time.

- Prepare the student for the Stitch-In efforts that will occur. For example: follow-up calls, emails, and letters.
- Student completes all paperwork and initials or signs all appropriate areas. Advisors should not make changes or strike-outs.
- The student will receive a copy of the Enrollment Agreement in the mail once accepted and signed by the Campus President.

# 10

## REFERRALS

SLIDE 13

The best source of leads has always been referrals.

- “(Student name), who do you know that could benefit from this type of education and career opportunity?”
- “(Student name), some of our best students are students who have been referred by other students. Who do you know?”