

Enrollment Counselor Onboarding & Training Plan

Week 1:

Get to Know Heidelberg

Week 1 Learning Objectives:

- ☐ Learn Heidelberg's mission, values, and culture
- ☐ Gain access to and navigate tools (Slate, email, phone)
- ☐ Build relationships with the team and partner offices
- ☐ Gain campus familiarity
- ☐ Practice key skills: hospitality, first impressions, phone etiquette
- ☐ Understand expectations for upcoming events

Onboarding Sessions:

- Welcome to Heidelberg with the Director
- Paylocity & HR meeting
- Parking pass, ID, keys
- Admissions & University Hall tour
- IT setup (Slate login, email, phone)
- Full campus tour – key spaces

Admissions Specific Sessions:

- Hospitality: Greeting visitors, phone etiquette, student support – *Opportunity Makers*
- Territory assignments
- CRM overview: Navigation, student records, queries, emails & texts
- Tech Tools Overview: Gmail, Zoom, Calendar, Google Drive
- Scavenger Hunt – Meet various departments and learn their role in student support
- Heidelberg 101 presentation
- Practice answering the phone and transferring calls
- Shadow calls & mock call scripts
- Practice notes & tasks in Slate

Week 2:

Deeper Dive into Heidelberg

Week 2 Learning Objectives:

- ☐ Increase understanding of Heidelberg's mission, values, culture, and offerings
- ☐ Learn engagement strategies from seasoned professionals
- ☐ Enhance cross-functional relationships

Heidelberg Team Sessions:

Departmental Deep Dives with all recruiters:

- **Student Affairs:** Student Organizations, Campus Events, Housing, Health Center

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- **Academic Affairs:** Academic Affairs structure, future meetings with department chairs, Honors Program needs
- **Alumni, Advancement, Marketing & Communications:** Student-to-alumni engagement, Branding & Marketing
- **Athletics:** DIII Athletics, Club Sports, Coach introductions
- Shadow Seasoned Counselor – Relationship building & calls
- Campus tour with President

Week 3:

Immersion Into the Role

Week 3 Learning Objectives:

- ☐ Develop an understanding of our mission, values, culture, and brand
- ☐ Understand admissions funnel and related communications
- ☐ Gain more advanced practical Slate skills (queries, travel setup, campaigns, application review) utilizing knowledge of the brand & institution to implement communications

Slate Workshop Sessions:

- Build queries
- Set up travel events using “Trips”
- Create email campaigns
- Understand reader review and app stages
- Register visit events

Application Review Sessions:

- Shadow file review with experienced counselor
- Begin reviewing with a second review from leadership

Outreach Sessions:

- Best practices by funnel stage (inquiry to deposit)
- Review current communication sequences

Shadowing Sessions:

- Admission visits
- Calls with staff
- Campus Tour
- Official Tour Route

Branding Session:

- Deeper dive into our brand

Organization Session:

- Staying organized using Google and Slate

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Week 4:

Owning the Message

Learning Objectives:

- ☐ Authentically tell Heidelberg's story
- ☐ Deliver presentations and tours with confidence
- ☐ Begin creating a territory strategy
- ☐ Master Slate tools and workflows

Sessions

- Deliver mock Heidelberg 101 to admission team
- Act as campus tour guide for a current staff member
- Identify high school contacts and upcoming fairs
- Continue Slate training

Week 5:

Building Relationships That Last

Week 5 Learning Objectives:

- ☐ Craft a personalized outreach strategy using data and storytelling
- ☐ Handle conversations with parents and influencers confidently
- ☐ Build and maintain relationships with school counselors

Sessions

- Professional relationship-building training – how to maintain relationships after the first contact
- FAQ Workshop: Common questions from students & parents

Week 6:

Getting Ready to Hit the Road

Week 6 Learning Objectives:

- ☐ Demonstrate readiness across all core skills: travel, visits, fairs, calls
- ☐ Build confidence in real-world recruitment situations
- ☐ Finalize and feel confident in travel planning

Sessions

- Mock College Fair – Role-play event participation
- Mock Campus Visit – Full simulation with team feedback

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Miscellaneous Sessions (as available):

- Review Heidelberg marketing materials: Web, Visit Folder, 101, Academic Sheets, Travel Piece
- Shadow student visit
- Review sample applications
- Headshot with Marketing
- Begin mapping out territory, updating contacts, identifying key schools
- Full residence hall tour (when no camps are in session)
- Meetings with faculty chairs
- Meetings with athletic coaches
- Personality assessment
- Sales training with Trustees in sales & marketing
- Inclusive language & communication workshop