How to Engage & Recruit Partners

Contacting new partners doesn't have to be difficult – and the rewards are outstanding.

Even though business partnerships can produce incredible results for students, it can be difficult, even for veteran teachers, to pick up the phone and initiate contact with potential business partners. Fortunately, there is a pain-free process for making first contact and develop a relationship that can help you produce the outcomes you want to see.

Before making contact, however, it's important to realize the value you're offering to these business contacts. Many teachers and administrators find it hard to reach out because it feels like you're asking for charity – that you have great needs, and you're asking for donations. And nothing could be further from the truth.

If you've read the first guide in this series – "What Partners Want" – you understand that working with schools can provide significant benefits to business partners. When you reach out, understand that you're offering as much value as you're asking for. These are "value for value" relationships; they are partnerships of equals. If you can make it clear when you're reaching out that you can provide employers with real value, you'll be well on your way to cementing a strong relationship that can last for years.

GO WITH WHO YOU KNOW

There is a time and place for making "cold calls," and there are tips at the end of this guide for those times when you have no other options for building needed partnerships. But your best option will always be to leverage your existing base of partners and your many personal and professional networks.

As noted in Guide 2 ("How to Find Partners"), you have access to many different networks that can help you connect with potential partners. By working through these networks, you'll find that it's much easier to make that initial contact, and that you walk in the door with immediate credibility thanks to the mutual contact making the introduction.

From your partners' points of view, this is also a much better arrangement. Businesses can field dozens of calls a year - sometimes dozens a month! - from people who want their help for various social and educational causes, and it can be time-consuming to build every relationship from scratch and figure out with whom they should work. Connecting with educators through individuals and networks they trust saves a great deal of time and effort.

MAKING FIRST CONTACT WITH NEW PARTNERS

In some cases, you'll be in a position to reach out to people you already know in order to engage them as partners: Perhaps it's someone you used to work for or with, or perhaps it's someone to whom you were introduced at a Chamber function. These, of course, are the best starting points for partnership development: Talking with someone you already know and simply inviting them to join your work.

However, more often than not, you'll need to approach people you don't already know. When reaching out the business partners you want to work with, you have two primary options, listed below in order of desirability:

The "Warm" Call

A warm call means that you are introduced to a new acquaintance by someone who knows both of you personally. (See Guide 2, "How to Find Partners," for more on finding prospective partners.) For example, if an advisory board member suggested that you contact one of her co-workers, that advisory board member would call or email them personally to suggest that they talk with you and explain the value you can bring to them. If a fellow teacher offered to connect you with his spouse, he would talk with his spouse personally and ask that they set up a time to talk with you.

Warm calls are your best option when connecting with a prospective partner. Given their existing relationship, your intermediary has a level of credibility with your future partner that makes it likely you'll be able to set up a meeting. In addition, your intermediary can talk in personal terms about their relationship with your program, making a partnership sound very attractive to your prospective partner.

The "Referral" Call

If you don't know anyone who has a personal relationship with both you and your prospect, the next best method is the referral call. Here, an intermediary still makes the introduction, but in this case that intermediary doesn't have a direct relationship with both you and your target. One example would be your advisory board chair calling people in the industry who he doesn't personally know; while he doesn't have a relationship with that prospect, his personal knowledge of your program and reputation in the field make for a very credible introduction. Another example would be asking a chamber of commerce representative to introduce you to one of her members; while she doesn't have personal experience with your program, she understands its value in terms of workforce development and can speak to the member in terms she understands.

Regardless of the source of introduction, or whether you're approaching a prospective partner on your own, try to keep the initial contact brief and focused on setting up a meeting. The introduction outlined in the "Cold Call" addendum offers a script for focusing on their needs as an employer, paving the way to a face to face meeting.

THE FIRST MEETING

If at all possible, ask that your first in-person meeting be held at their place of business. There are several reasons for this:

- It makes it as easy as possible for them to meet with you. Going off-site requires more effort for them, which makes it more difficult to commit and easier to cancel.
- It gives you a chance to learn about the work they do firsthand. One of your goals – whether you develop a relationship with this contact or not – is to keep current on the careers you cover, and going to their place of business allows you to see facilities, equipment and materials, and current practices as they're being used in a work setting. You'll gain great information for your program even if you don't go any further with this particular contact.
- It gives you a chance to make other connections within that company. If you meet offsite, you'll only talk to a single person; if you go to their place of business you'll have a chance to be introduced to others in the company, each of whom can be a volunteer or partner contact.

In terms of the focus of this meeting, try to keep the focus on your prospective partner. Yes, you can spend some time describing the work you do, but you want to learn as much as you can about their business: What they do, what their challenges are (especially hiring challenges), and what knowledge, skills, and attitudes they look for in the ideal candidate. (See the questions in "Guide 1: What Your Partner Wants" as a starting point.) You approached them by saying you wanted to get information to inform your program; it's important that you gather that information at the first meeting, both for program improvement purposes and to let them know you care about their outcomes.

At the same time, you do need to be prepared to tell your potential partner what it is you want, or at least have options in mind as to how you might work together. While you're keeping the focus of the meeting on their needs, some will want to start talking specfically about your work and your needs, and you don't want to be caught off-guard without a response when they ask how they can help.

Finally, if at all possible, bring the intermediary who introduced you. If it's someone already familiar with your work, whether they know your prospective partner or not, they lend credibility to your program and can speak firsthand about the work you do and what it has meant to them. And before you leave this first meeting, be prepared to invite them to a second meeting, one at your program site, at a time when they'll be able to meet students and instructors and see them in action.

THE SECOND MEETING

Your first meeting was a fact-finding effort on your part, intended to learn more about your new partner and his or her needs. Once they see your sincere interest in better preparing future employees for their operations, they should welcome an opportunity to meet again to learn more about your program.

This second meeting should be held on-site at your program's location, giving them an opportunity to see your facilities and talk with students and teachers. These meetings should be held during the school day; a before-school or after-school meeting only allows them to see empty rooms.

It's important that you give a good tour. Let students and teachers know that you have a possible partner coming, and make sure they're ready to talk about what they're doing in the classroom. You don't want to script people by any means, but do give them an opportunity to prepare to present themselves well.

Focus on the positive. If you focus on your needs and challenges – "we don't have enough funding," "we don't get any support from industry," "the administration is tough to work with" – you'll lose a potential partner. People want to be part of something successful. Talk about the students who successfully entered industry, and where they work. Talk about the certifications earned by students. Talk about the first-place finish at the state competition. Make it clear that your program has momentum, and that you're trying to build on success.

MAKING THE PITCH

After this "getting to know you" phase, your partners will have a clear sense of how your program can connect with their needs, and you'll have a good enough sense of who they are, and what resources they have available, to start talking about specific ways in which you might work together. This should be a collaborative process; you want your industry counterpart to feel ownership. Make sure your initial ideas reflect their interests and desired outcomes, and be very open to changing your initial ideas based on their feedback.

Once you both have a good idea as to how you can work together, and you have laid the groundwork for your partnership, take the time to map out your respective roles and responsibilities in detail, and put everything in writing. This cements their commitment, and prevents problems down the road.

WHAT TO DO

A few pieces of advice when establishing a relationship with a new partner:

- **Be realistic.** We all want to change the world tomorrow, but we also have to acknowledge that we're working with a limited set of resources, including the time available to build your partnership initiative. Set goals that are achievable given your and your partners' constraints; overpromising and underdelivering is a good way to end a promising relationship.
- **Share the workload.** Remember that you're building a partnership of equals; that means that you're each receiving benefits, and each investing in the success of the partnership. Don't assume that the bulk of the work needs to fall on your shoulders; your partners should share in the effort, just as they'll share in the rewards.
- **Focus on relationships.** The best partnerships are long-term partnerships; focus in the early stages on getting to know one another, including work styles and priorities, so you can build a strong and collaborative relationship.

WHAT NOT TO DO

Finally, a few pieces of advice on what not to do when approaching new partners:

- **Don't just talk about yourself.** You want to build a partnership of equals; if you spend all your time talking about your program and your needs and ignore their interests, your prospective partner will quickly realize that the partnership is likely to be one-sided. No one wants to sign up for a project that is all "take" and no "give."
- **Don't let your partner down.** If you say that you're going to meet at their office at 9am, be sure to be there at 9am. If you say that you're bringing students for a site visit, make sure to be there and be on time. If they start to feel that they can't trust you, your prospects of future efforts dwindle quickly.

- **Don't move too fast.** We all want partners to make major commitments, but successful large partnerships work best when they're preceded by the kinds of smaller projects that let people get to know each other, building trust and a track record of success.

ACTION STEP: KEY QUESTIONS

As you work through these stages, answering the following questions will help you go from prospect to partners:

Making first contact

- Do I have anyone who can act as an intermediary, such as a mutual acquaintance, someone known in the field, or someone who works for an intermediary group (chamber of commerce, sector group, etc.)?
- Can that person attend the first meeting with me, or at least make an introductory call or email on my behalf? If not, can I reference that person in my own outreach?
- If I need to contact this person directly, do I know anything about his or her business I can include, such as a former student working there? Do I know anything about their interests (known worker shortage, new to the area, etc.) I can leverage in my introduction?
- Do I know the dates on which I can get off campus to meet with them at their place of business?

The first meeting

- Can we meet at their office? If so, are they willing to provide me with a tour so I can learn about their operations?
- Do I have a list of questions ready to learn more about their business, current practices in the industry, and what they're looking for in qualified candidates?
- Do I have program materials I can share? (Remember, you're there to learn about them, but you'll want to share enough information on your work to let them know you represent a solution to their problems.)
- Am I prepared to prompt them for a meeting on our campus, including when I could bring them so they see students and teachers working productively?

The second meeting

- Can they visit my program during school hours, so I can introduce them to instructors and students?
- Do I have instructions I can send them so they can easily get to me? (Parking information, details on signing in, etc.)?
- Have I practiced my tour, including where to go and what points to emphasize? Do I have students (such as CTSO officers) who could be trained to give tours?
- Have I talked with students and staff to prepare them for the visit, including behavior standards?

The pitch

- Have I learned enough about my prospect's priorities and needs that I can start to talk about partnership options that might work for them?

- Have I emphasized the collaborative nature of our partnership development process, considering it a "partnership of equals" with each side contributing and receiving value?
- Have I made sure to give my new partner ample opportunity to contribute to the planning process? Am I treating this as a truly collaborative venture?
- Have I gotten enough specifics down that I can draft a written agreement detailing our respective goals, measures, and responsibilities? (Note that a future guide will address the development of Memoranda of Understanding.)

ADDENDUM: THE "COLD" CALL

If you don't have anyone who can act as a credible intermediary, it's time to make contact yourself. While not ideal, this method can be very effective if you use the right strategy. And the "cold call" heading here is a bit of a misnomer: Even though you're going in cold (i.e., without an intermediary), you can easily turn it into a "warm call" by relating to their interests as quickly as possible.

In most cases, you'll have a specific person who you've been encouraged to contact thanks to one of the lead-generating activities mentioned above. If you have no idea who specifically to contact, depending on the size of the organization, you might start with an upper-level executive, the person in charge of Human Resources, or the person in charge of Community Relations. They may not ultimately be the right person, but they'll be able to direct you to the appropriate contact.

More than anything else, business partners want to share their expertise with schools, which gives you an "in" when you reach out to them. Call or email (whichever you feel most comfortable doing) to briefly note that your program prepares people for certain careers, and since you understand they hire people in those areas, you'd like to ask for their insights so you can better prepare your students. A sample email script (taken from the Employer Engagement Toolkit with permission) is as follows:

> **SUBJECT: Guidance on welding instruction needed for [School]**
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> Dear x,
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> I run the welding program at [School]. I was hoping for a chance to meet with you: I understand that your company hires welders on occasion, and I'd like to learn what you're looking for in your new employees. We prepare students for this field, and we rely strongly on industry feedback to tailor our instruction.
>
> Would you be interested in connecting by phone for 10-15 minutes? When would be a convenient time for you to talk this week?

Notice that you're not asking for a partnership at this point: You're asking for a minimal commitment of a single conversation to find out what they're looking for in new employees, a topic that will be of great interest to them if they have any challenges at all in finding qualified people. You're focused on their expertise, which is flattering. And you're keeping the inquiry as brief as possible, which makes it more likely that the email will be read in the first place.

ABOUT THIS GUIDE

This guide has been developed by Colorado CTE, housed at the Colorado Community College System to help Colorado CTE educators build strong and lasting relationships with employers and other stakeholders. For more information on CTE and other resources available to help you, please visit http://coloradostateplan.com/.