

GreenWays



JOBS FOR THE FUTURE

EMPLOYER ENGAGEMENT TOOLKIT | TOOL 2.3

## DEVELOP HIGH-LEVEL RELATIONSHIPS

### TOOL 2.3

Developing relationships with the top leadership of successful employers should be central to your employer engagement strategy, because these decision makers are critical to ensuring that the businesses fully support your partnership. The buy-in of high-level staff also sends a powerful message to other employers that you are an industry player.

This worksheet offers step-by-step guidance for your initial outreach to the leadership of potential partner organizations. The recommended actions respond to the limited time and availability of high-level staff, and are planned for maximum impact and efficiency.

#### WHO SHOULD USE THIS TOOL

Executive directors, program directors

## WHO SHOULD YOU TARGET?

High-level staff members are defined by the scope and range of actions that they can take on their own authority, and they primarily include:

- > Principal business owners
- > Chief executives (CEO, COO, CFO, CTO)
- > Department heads
- > Some senior program managers

## PREPARE INTERNALLY

Before you talk to anyone external, prepare internally. Prior to your meeting, conduct significant research to determine which employers may be the best fit for your organization based on factors such as their workforce needs and alignment with your mission. Once you have completed this step, you need to cement buy-in for these partnerships within your own organization. Determine who within your organization should be aware—and supportive—of these potential partnerships. Outreach to these staff members will take time but will also generate buy-in and champions while ensuring that you do not accidentally create turf wars.

Relevant internal staff:

- > \_\_\_\_\_ > \_\_\_\_\_
- > \_\_\_\_\_ > \_\_\_\_\_
- > \_\_\_\_\_ > \_\_\_\_\_

Be sure to prepare all staff in your organization who are equivalent to the high-level external partners. This might be your executive director or others who work in the upper levels of your organization.

Meetings with these individuals should focus on:

- > **Program content.** If needed, provide a refresher on how your program benefits your organization, participants, and partner organizations. Benefits may span mission, reputation, and finances.
- > **Outreach activities.** Let your colleagues know who you plan to contact, and be prepared to discuss how you selected these targets. With a focus on their unique standing in the community, ask for targeted help with outreach to these or other important contacts.
- > **List of high-level contacts from your colleagues,** including the nature of the relationship and outcomes from previous collaborations. Ask your colleagues to identify critical decision makers that can help your organization develop strong, lasting partnerships with the employer. These may be individuals with whom they have worked directly, or with whom they are acquainted for other reasons (e.g., they have served on boards with them, or know them socially). In addition, it is important to determine the level of familiarity of your colleagues with these contacts, as well as outcomes from any earlier collaborations. The results of previous projects—successful or not—will help you frame future outreach. You should also note which staff member will be contacting each person:

- > \_\_\_\_\_
- > \_\_\_\_\_
- > \_\_\_\_\_
- > \_\_\_\_\_
- > \_\_\_\_\_

Prior to contacting these high level contacts, it can be useful to first reach out to other individuals in the community who are familiar to them. These may include individuals that serve on your board or work at a partner. A good initial step can be talking with these other individuals to learn more about the employers' interests and potential opportunities for collaboration. You can use these initial background conversations to gain critical insight on employer interests and determine if there may be an interest in collaboration among higher level-staff members with the employer.

List of other individuals in the community familiar with the target employer's high-level staff members (you should also note which staff member will be contacting each person):

- > \_\_\_\_\_
- > \_\_\_\_\_
- > \_\_\_\_\_
- > \_\_\_\_\_

> **Talking points.** Make sure that everyone agrees on partnership priorities and messaging. Even if you are conducting the primary outreach, all relevant staff should be on point for when they can help, or in case they have a chance encounter with one of these contacts.

Limited talking points that will not overwhelm potential partners:

- > \_\_\_\_\_
- > \_\_\_\_\_
- > \_\_\_\_\_

## INTRODUCTIONS TO EXTERNAL PARTNERS

Prepare for your introduction to potential partners by gathering information about both the company and the individual you are contacting. Also, stage your initial outreach to concisely express your purpose. This will help demonstrate your value in their terms so that you can successfully secure a meeting between your organizations.

### BACKGROUND

Company: \_\_\_\_\_

Background information: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Value of company to your program: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Individual: \_\_\_\_\_

Title: \_\_\_\_\_

Key biographical information: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

If you have a personal referral to this person:

Individual referring: \_\_\_\_\_

Nature of their relationship: \_\_\_\_\_

### PLANNING THE FIRST APPROACH

Individual making the approach: \_\_\_\_\_

Reason they are best for outreach: \_\_\_\_\_

Method of the first approach:

- |   |   |
|---|---|
| <input type="checkbox"/> Phone call                   | <input type="checkbox"/> Through referral                 |
| <input type="checkbox"/> Email                        | <input type="checkbox"/> Letter with background packet    |
| <input type="checkbox"/> Personal contact at an event | <input type="checkbox"/> Letter without background packet |

Reason for outreach method: \_\_\_\_\_  
\_\_\_\_\_

## MAKE YOUR PITCH TO EXTERNAL PARTNERS

After your introductory calls, start preparing for a meeting with your potential partner. Your first meeting is the most critical step in building a deeper relationship with an employer, and it is your chance to make your pitch about the relationship you want.

Attendees from:

#### Your organization

#### Potential employer

_____	_____
_____	_____
_____	_____
_____	_____

Key objectives (make sure your objectives are realistic to achieve in this meeting): \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Agenda (if there is not an agenda, describe why or consider proposing one): \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Questions you anticipate**

**Answers to these questions**

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Materials:

- > Background materials that have been sent: \_\_\_\_\_  
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- > Materials being brought to the meeting: \_\_\_\_\_
- > Audio-visual materials (e.g., slides or video): \_\_\_\_\_

## FOLLOW UP AND KEEP FOLLOWING UP!

Continued engagement is critical to ongoing success. Once you engage the right partners, make sure you keep them informed and connected.

Describe how the meeting met or differed from expectations: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Follow up on any action steps that came from the meeting:

ACTION ITEM	PERSON RESPONSIBLE	SHORT / MEDIUM / LONG TERM ACTION	DEADLINE
Thank you letters to all attendees			

Referrals to other potential employers: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Put a system in place to make sure that the action steps are completed and other regular follow-up continues with these employers. Some suggestions include:

- > Assign a manager for client maintenance.
- > Create a file for the employer that summarizes all key activities.
- > Conduct monthly check-ins by email that briefly update them on progress and ask how your program can best meet their needs.