

# Leadership Workshop Meeting Notes

October 16, 2003

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## Club Leader Attendees

Greg Bolino  
Riccardo Cesarei  
Dario Epstein  
Jonathan Histed  
Neil Janmohamed  
Don Konipol  
Jerry Liu  
Richard Lui  
Harry McElroy  
Steve Morris  
Jane Okun  
Peter Scott  
Cecil Shepherd  
Barry Trout

## Staff/Student Attendees

Kyle Yam, BBA Global Blue President  
Mike Andreasen, Assistant Dean  
Ann LaCivita, Director of Alumni Relations  
John Copeland, Director of Annual Giving  
Mary Jo Frank, Executive Editor, Dividend  
Melanie McIntyre, Assistant Director of Alumni Relations  
Rob Pasick, Workshop Facilitator  
Gwyneth Slocum-Bailey, Associate Director of Admissions  
and Career Development  
Leslie Southwick Wilhelm, Brand & Communications Project  
Manager  
Cynthia Shaw, Director of Communications  
Mary Vingerelli, Promotion Coordinator, Communications

## OBJECTIVES

- To provide our alumni club leaders with a forum in which to share ideas, challenges and best practices.
- To acknowledge the important contributions of our alumni volunteers, especially our alumni club leaders.
- To provide alumni club leaders with the opportunity to participate in a dialogue with Dean Dolan.
- To introduce alumni club leaders to other members of the Business School community, including students, faculty and staff.

## WELCOME AND INTRODUCTIONS

Ann LaCivita, Director of Alumni Relations, thanked the attendees for giving their time and attention to the Workshop. She provided an overview of the Alumni Relations function of the Business School.

Rob Pasick, Workshop moderator, reviewed the meeting agenda. He led the group in introductions and asked each attendee to speak about their alumni club leadership role. The round of introductions was followed by short presentations of best practices by several of the alumni clubs. Many of these best practices were referred to, discussed and elaborated on throughout the day.

## MOTIVATIONS FOR BEING INVOLVED WITH ALUMNI CLUB

- Want to be involved in school when here.
- In transition, want to network with other Business School alums
- Made a lifestyle change – no other alumni contact in the area
- Networking – wanted to drive attendance at club activities
- Meet people, wanted to continue Business School experience
- No club in area
- To promote the Business School and network in the area Networking
- Get connected with University of Michigan alums – have a Business School presence at UM events
- Multi-school organization of top business schools
- Needed at tennis partner
- Recruitment of top area candidates
- Wanted to give back
- Build the Michigan Business School Brand
- 5 year reunion sparked interest

- Engage the “untapped asset”

## SESSION ONE – SHARING BEST PRACTICES

Rob Pasick – LeadersConnect Breakfast Series (videos available at <http://www.bus.umich.edu/Technology/MichiganAdvantage/Webcasts/Default.htm>)

- Swap shop – put out your resources and your needs in a group for “swapping” with others
- Could use the LeadersConnect videos in the workplace
- Live video streams to all alumni as the event is occurring
- Multicast Media – does this live video stream (Barry Trout has contact)

Barry Trout (Atlanta) – Best Practice: Video Lecture

Cecil Shepherd (NYC)

- Club Advisory Board – Re-introduce senior alumni to the club
- Breakfast series – Co-Sponsored by the Michigan Professionals Network (U-M) and by the Office of Development.
- Slide Show on the website for new alumni to get acquainted to city and to the Club
- 25 people on leadership team – divided by specialty
- Development campaign with John Copeland targeted to new York City alums

Jane Okun (Denver)

- Shared how the group was formed
- How to develop corporate sponsors / partners \$5000. Have 3 now, goal is 5.
- Board is made up of people from all different Business Schools.
- Does it make sense for smaller clubs or is it only for larger areas?

Neil Janmohamed (Minneapolis)

- Journey of the Minneapolis club over the past year. Was thrust into the leadership role. First arrived, went to a welcome reception
- Wanted to reach out and develop a leadership team. Goal was to get 4-5 people to help plan and organize events
- Plan was to start with new graduates (worked with OCD to get emails) and people doing their internships there.
- Series of events to develop into a Keynote event

## SESSION TWO, PART ONE – ROUNDTABLE DISCUSSIONS

### Track 1 – Involving Senior Alumni in Club Activities (Cecil Shepherd)

Club Objectives:

- To fully leverage the strength of the extensive MBS/U-M New York regional\* alumni network.
- To encourage current and prospective students, as well as faculty, staff and alumni, to participate in all club activities.
- To build and continuously improve the bridge between Ann Arbor and “The Big Apple”.
- To have fun

Club Community:

- Over 1,300 MBS alumni on e-mail list.
- Alumni in every major business industry

Best Practices:

- Club Advisory Board
- Re-introduce senior alumni to the club

- Breakfast Series
- Co-Sponsored by the Michigan Professionals Network (U-M)
- Co-Sponsored by the U-M Office of Development
- Resource Guide (for New Grads And Summer Interns)
- Important Numbers
- Useful Links
- Shows and Entertainment
- Sightseeing Information
- Museum Information
- Cultural / Sports
- Media Guides

## **Track 2 – Implementing a Career Networking Group Model (Barry Trout)**

The Business School Alumni Club of Atlanta developed a Career Networking Group in 2002, within the Atlanta Business School Alliance, based on unprecedented number of Michigan b-school alumni “in transition” due to the economic downturn that started in 2000.

Successes:

- 80-100 people have participated in the past year.
- Have expanded to include other top nationally ranked Alumni Clubs
- Established relationships with recruiting firms
- Have become a source of talent

Best practices:

- Executive Recruiter Meetings
- Leverage strength of group by holding meetings with 6-12 CNG candidates and top recruiting firms who wouldn't meet with people individually.
- Lead and Contact Sharing
- Group shares leads and contacts within the group as well as on the website (over 1000 contacts)
- Becoming a Source of Candidates
- Position descriptions are now being sent to the group from companies and CNG members who've landed a job
- Group Working Sessions (i.e. reviewing resumes)
- Leverage experience of the group to identify best practices and help each other
- Strong Communications (MSN groups and Yahoo email list)
- Cost Minimization (meet at free locations, msn groups, SAVE MONEY)

How do you start?

- Identify People To Lead The Career Networking Group
- Develop Group Objectives
- Develop Infrastructure
- Create Awareness And Launch

Growth Ideas:

- Job search (ask top companies to send open positions, contact people who have been placed through the organization)
- Career Development

## **SESSION TWO, PART TWO - GROUP DISCUSSION**

List of proposed questions:

- How do you maintain the interest and dedication of our club members and volunteers?
- How do we get more people, the RIGHT people, to participate in the alumni network?

- How do we engage our senior alumni? What is a senior alumnus?
- How do we differentiate a network?
- What are good evaluative metrics
- Expectations (reach vs. participation)
- Critical Mass
- Activities
- How can you leverage the Michigan club in your area?
- How do we get alumni to update their database?
- How can the clubs help not only RECENT grads but ALL grads with career assistance?
- How can the clubs better coordinate with the school?
- Professor Visits
- Recruitment

## LUNCH

*Incorporating the Brand Mark into Club Communications - Leslie Wilhelm, Brand & Communications Project Manager*

### Breathing Life into the Brand

- Be an Ambassador
  1. Understand our core values and key messages and how they are interpreted and applied.
  2. Deliver our brand consistently – to prospective students, to colleagues, friends and among yourselves.
  3. Do your best with the Graphic Identity.

### Recommendations

- Standard club name
  - “MBS Club of [Location]”
- Co-brand with the MBS brand
  - Samples in your folder
- Incorporate the brand mark into web sites and communications
- Use the graphic identity system typography, color – when feasible
- Live our core values

### Resources

- Strategy Tool Kit
  - [www.bus.umich.edu/NewsRoom/StrategyToolKit](http://www.bus.umich.edu/NewsRoom/StrategyToolKit)
- Brand mark files
- Templates – MSWord and PowerPoint
- Sample files
- Reference sheets

### So What Do I Do Now?!

- Be Clear. Be clear about who we are.
  - Understand the brand
- Be Consistent. Always be about who we are.
  - Use the brand repeatedly
  - Avoid competing elements
- Be Constant. Repetition over time is the key to achieving broad recognition and understanding.
- Be Patient. Change is happening over time.

## SESSION THREE – DIALOGUE WITH THE DEANS

### Dialogue with the Dean and Michael Andreasen

Dean Dolan discussed the School's strategy and implementation to date. He also updated us on the challenges and prospects facing the School. He highlighted how we need to get ourselves in the right "neighborhood" of the top schools and then differentiate ourselves. Finally Dean Dolan shared some remarks regarding planning for our schools capital campaign.

Some of the highlights of Dean Dolan's presentation included:

- The School hired 10 new faculty members this year.
- The School is working hard to provide better feedback for faculty.
  - A new teaching program has been implemented.
  - The School has created a new model for research funding to better support faculty and to encourage development of large-scale initiatives.
  - Some new large scale initiatives include:
    - Centers for Positive Organizational Scholarship
    - Global Research Leverage in India
    - Business and World Peace
    - Executive Education is implementing a new "Center of Excellence" strategy and will continue to play a key role in developing intellectual capital with impact.
- Recent innovations in business education include:
  - 92 new courses introduced since 1995.
  - An expanded LDP / Global Citizenship program.
  - Rollout of a new LDP II program for graduating MBA students 2003-04.
  - A technology based "Champions Project".
  - Tozzi center courses.
- In addition, Dean Dolan announced that the Michigan Business School is now developing courses for business education.
- Dean Dolan overviewed the many Action Based Learning Programs at the Business School.
- The vision for a new Michigan Business School includes:
  - Being the "Best" at what we do, fitting our strategy and values, providing value to companies and suiting the needs of particular students.
  - The reputation at the Business School has recently been recognized in the Wall Street Journal rankings and in the multiple awards given to the School for Environmental and Social Concerns in WRI / Aspen.

## **SESSION FOUR – GOALS & TAKEAWAYS**

Rob Pasick, Facilitator

Roundtable Discussion on Club Goals and Takeaways from Leadership Workshop

In a roundtable discussion, we asked the club leaders, "what are your PRIORITIES to help you run your club better with the ultimate goal of strengthening the Business School?"

How do we get more people to events?

- Faculty visits (book tours)
- Online Video Resources
- A complete package with a video and PowerPoint presentation in one with a marketing campaign
- Marketing campaigns you can cut and paste into an email.
- Use students to edit video recordings of the monthly Leaders Connect series, make questions and a marketing campaign.
- Simulcast live events

How can we coordinate efforts to reach senior alumni?

- Appropriate approach so alums are getting the right message from a single source

#### Executive Education Participation

- Better market so that people will become part of the community and be added to the database.

#### How can we encourage alums to update the MBS Database?

- Contest among the clubs. Whoever could find the most alums would win 6 Ohio State tickets
- Send email to club leaders when alums move out of state
- Census for addresses and interest in involvement

#### What is the new “hot” topic to attract alumni to events?

- Mentoring, Human Resources, Leadership

How do we get people to understand that this is a long-term commitment.

#### What about a Business School Alumni Club Alliance?

- Alliance: If one is formed, will we lose the senior alumni? They like to see the Michigan name.
- Co-Branding with a Harvard will cannibalize our name.

How to differentiate Michigan alumni club with the Business School Alumni Club?

How do we meet the need of the people in our club? Help people through difficult times.

### **SUMMARY, WRAP-UP AND EVALUATIONS**

Club leaders discussed the importance of club metrics to be sent to everyone including number of members and % increase at events.

#### Individual Club Goals:

Club	Goal	Support
Cleveland	Formally Start Club	Jane Okun and Neil Janmohamed
Los Angeles	Establish Leadership Team of 4-6 people	Greg Bolino
Chicago	Sustain Leadership Team	Harry McElroy
Italy	Formally Start Club	Gwyneth Slocolm-Bailey
Minneapolis	Have 3-5 events per year with 30-50 people. Have 1 high profile events (3 CEOs)	Rob Pasik
Atlanta	More people at events – 8 events a year	Greg Bolino
Singapore	Increase active membership to 40, increase the number of applicants that apply to MBS	
Houston	Formally Start Club	