**Advisor Recruitment:**

Step 5: Making the Ask – Items to Cover

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| **Topic** | **Notes** |
| **Review of Chapter/Advisor Introduction Meeting** | * Thank them for their willingness to meet the chapter/advisors. * Ask for their impressions, feedback, feelings from the visit. * Ask how the visit impacted their interest in serving as an advisor |
| **Make the Soft Ask** | * Indicate that you would like them to serve as an advisor and in which role you see them fitting. * Ask for their reaction/thoughts about the role. * Let them know that before they accept the position, you have some things you would like to cover. |
| **Review Expectations** | * Review basic advisor expectations (refer to capable & committee checklist). * Review your expectations of advisors (if they differ or are more specific). * Review the basic culture of the chapter and what you would like the advisor to focus on in their specific position. * Ask for and respond to any questions. |
| **Review Next Steps** | * You will send an official email appointing the advisor. The email will contain the following information:   + Instruction on setting up a myBeta account (explain what myBeta is).   + Contact information for your advisee and the Chapter Counselor. * Within the next week I will be in touch to set up a time for us to meet (either in person or over the phone) to conduct your Orientation. * Confirm you have all of their correct contact information:   + Correct spelling of name   + Mailing address   + Home/Work/Cell number   + Email   + Greek Affiliation (if any) * Ask for and respond to any questions. |
| **Welcome them to the Beta Family and offer thanks!** | * No explanation needed! |

