



# Case Scenario

## FOR GROUP DISCUSSION

### MODULE 2, LESSON 1

#### Claudia and Internal LMI

##### Introduction

Consider how an Employer Engagement Representative might approach making a connection with a new employer when a coworker mentions an office supply company opening a branch nearby.

##### Part 1

Claudia is an Employer Engagement Representative and is always looking to connect with new employers in her community. Her coworker casually mentions an office supply company that is opening a new branch nearby. This catches her attention. What should she do next?

**Claudia:** "I really want to connect with this new office supply company. I think my next step should be..."

- 1. Option 1: "I'm going to share the lead at this week's staff meeting and see if anyone is already working with the company or has a past relationship with them."** (*"Yes, this is the best choice to move forward. I will ask if anyone knows the owner, if the employer is connected with VR at all, and if so, in what capacity."*)
- 2. Option 2: "I'm going to Google their HR department, find the phone number, and ask about their job openings."** (*"Hmmm...that's not the best idea. I need more information before I can cold-call anyone."*)

It's important for Claudia to connect with her team before proceeding. She won't want to duplicate efforts or burden the employer if a coworker is already working with them. Investigating this information is an important first step. ***What are some ways that your agency shares internal information?***

## **Part 2:**

Remember Claudia? Claudia got a lead about a new office supply company in her area. She checked with her team to make sure no one else was working with them. Now she's organizing her information about the employer.

**Claudia:** "Okay, I've got a name, contact phone and email, the office address, and some notes about their company. I need to write this down somewhere, so it doesn't get lost. I want to stay organized!"

**Branching Scenario:** Claudia says: "I'm going to document everything..."

- 1. Option 1: "In my own spreadsheet. It's organized just the way I like, and I'll be able to find it on my desktop."** ("Let think about this...using my own spreadsheet won't allow anyone else in the agency to access the information if they need it. I should probably use the agency database.")
- 2. Option 2: "In the office case management system."** ("Right! This allows everyone in the agency to access the information and help us all communicate better.")

Proper documentation is important! Claudia is welcome to have her own data systems for leads, but it shouldn't replace a shared database. A shared data system helps streamline data collection, eliminates duplicative efforts, and is critical to sharing information.

**These scenarios demonstrate a couple of important points:**

1. How initial employer connections need to be planned, both in your approach as well as what information is available to you from coworkers and partners. This information will also help you prepare for your elevator pitch if you are using a contact as an introduction to the employer, or as a reference.
2. Your responsibility to help facilitate internal information sharing. Communication is vital to an agency and its work, and it is something that should never be taken for granted!