Recruiting Best Practices in Prospecting: Developing the Skills Necessary to Recruit an All-Volunteer Army—A Delphi Study.

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Recruiting Best Practices in Prospecting: Developing the Skills Necessary to Recruit an All-Volunteer Army—A Delphi Study

A Dissertation by

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To my best friend, the light of my life, the natural leader, my high school sweetheart-Tami, thank you for putting up with me being gone or when I’m home not really being there. My children-Samantha, Kimberly and Jacob, you motivate me with all of your many talents. I hope we continue to grow together and share our discoveries through this life journey. I look forward to getting to know you again now that I finish this excursion and begin another one with you. Thank you for your patience and support. Without your encouragement this would never have been possible.

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DEDICATION

“The supreme quality for leadership is unquestionably integrity. Without it, no real success is possible, no matter whether it is on a section gang, a football field, in an army, or in an office” (Eisenhower, n.d., Success, Leadership, Army, para. 1).

I want to dedicate this to the warriors who do battle everyday upholding standards. Integrity is constantly under attack, and the leaders and followers who face it with a smile on their faces is whom this work is dedicated to.

Having the courage to say no to a leader is what good followers do. Utilizing skills like those taught at Brandman University are key in developing an ethical core. Once you know what your principles are, decisions are easy. If you fight for standards and are a person of integrity, I want to say thank you. Thank you for your energy and courage. Thank you for your passion and dedication. Thank you for choosing the hard road. Just like a doctoral journey that is hard, it is even harder if you don’t know yourself. I encourage you to find a path, journey, or program that gives you the tools to get to know yourself so the future is easier.
ABSTRACT

Recruiting Best Practices in Prospecting: Developing the Skills Necessary to Recruit an All-Volunteer Army—A Delphi Study.

by Jeremy E. McMullen

Purpose. It was the purpose of this Delphi study to discover what the best practices are for implementing telephone, virtual, face-to-face, and referral prospecting, as reported by an expert panel of Army Recruiters when targeting 17-24 year olds.

Methodology. This Policy Delphi study was accomplished in three sequential rounds, with 19 homogeneous expert participants whose mode of operation is remote, anonymous, and computerized. The rounds explored a complex recruiting process through the lens of expert Army Recruiters. The process of discovery, consensus, and implementation identified: (a) planning practices, (b) lead sources, (c) establishing rapport, (d) identify goals/needs/interests, (e) overcome assumptions, (f) engendering a commitment, and (g) overcoming barriers best practices.

Findings. No single dominant prospecting best practice method was identified all seven areas of prospecting. The most cumulative consensus best practice coded responses involved telephone and face-to-face prospecting methods. Many coded best practice responses crossed into multiple methods. The discovery, consensus, and implementation process identified homogenous themes as constant best practices such as active listening, asking open-ended, fact-finding purposeful questions, identifying solutions to a need, and product knowledge.

Conclusions. The Delphi best practice research of real experience, historical successes and literature support that the recruiters who have social awareness and are able to
manage relationships by sharing a common experience with the prospect, ask open-ended fact finding questions, empathetic listening, restate answers, communicate the Army benefits that can help the prospect achieve their goals, and provide information about the modern Army are using best practices for engendering a commitment in prospecting will be more efficient in making recruiting mission.

**Recommendations.** Further research is advised to add to the scientific rigor of best practice theory. Conduct a quantitative study to obtain macro results and a qualitative study for micro results and compare best practice results. Investigate the outlying best practice response results to reduce the risk of a flawed consensus. Replicate best practice research methodology to identify and describe other critical recruiting areas of emphasis (i.e., interviewing, processing, and leading future soldiers) in the Army and in other branches of service, allied services, industry and in education.
PREFACE

This dissertation came about because of the problem of finding the people necessary for Army service in an all-volunteer military environment. I decided on the topic of prospecting best practice because I felt it had the opportunity to increase recruiting success. The transformational aspect of this particular subject drove me to try and understand the complex human relationship of prospecting. The main characters are the expert Army recruiters who have the difficult job of qualifying the right people for a profession of arms. This dissertation is intended to educate the reader about the complex human relationship of prospecting from the perspective of the Army recruiter. What the reader can hope to learn by reading the dissertation of prospecting best practices is a better understanding of the seven operationalized prospecting terms: (a) planning practices, (b) lead sources, (c) rapport, (d) identify goals/needs/interests, (e) assumptions, (f) engendering a commitment, (g) eliminate barriers and how historical evidence of past success can be replicated for future success. The journey of writing this dissertation was one of change. I experienced joy by focusing on best practices instead of the traditional approach of trying to identify problems. I now better understand the importance of empathetic listening and asking open-ended, fact-finding, purposeful questions. My self-awareness understanding of my weaknesses allowed for me to surround myself with exemplary mentors. The insights into real life situations gained through the writing of this dissertation helped me understand the difficult job of recruiting in today’s market. I changed as an author and as a person during the process.


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CHAPTER 1: THE PROBLEM

We must never forget why we have, and why we need our military. Our armed forces exist solely to ensure our nation is safe, so that each and every one of us can sleep soundly at night, knowing we have ‘guardians’ at the gate. (West, n.d., Military Quotes, para. 1)

Twenty-first century America has enjoyed being a global leader while maintaining the world’s largest all-volunteer military (AVM), in part thanks to successful recruiting (O’Hanlon, 2013; United States of America Army Recruiting Command [USAREC], 2013). The AVM is actually an all recruited military. Recruiters have to work hard to find the quality and quantity desired to keep the AVM sustained. One of America’s longstanding philosophies is the belief that for America and its allies to remain prosperous and stable, America must have a professional military to protect its freedom and that of its worldwide alliances (Kellerman, 2012; O’Hanlon, 2013; The Army Profession, 2014). For over forty years, recruiters have ensured the safety of America and sixty worldwide partner nations by recruiting the personnel necessary to have a volunteer military (O’Hanlon, 2013; The Army Profession, 2014; USAREC, 2014a).

However, America may not be able to recruit the quality and quantity of personnel necessary to maintain the military’s health, for the Army, specifically, is under significant pressure to make its recruiting quota (Batschelet, 2014 February 2; Hogan, Simon, & Warner, 2004; Orvis & Asch, 2001). Finding quality applicants requires a skill set while prospecting for applicants (USAREC, 2015). Recruiters have to quickly wade through the ineligible while at the same time create interest in joining a difficult and sometimes dangerous profession (Figure 1).
The Army Profession exists not for itself but for the noble and honorable purpose of preserving peace, supporting and defending the Constitution, and protecting the American people and way of life” (The Army Profession, 2014, p. 27). The Army is committed to service, sacrifice, and respect for human life and is looking for only the best to live up to that challenge (Snider, 2012; USAREC, 2014a).

America is currently engaged in the longest war in its history, with no clear end, and the Army is experiencing significant recruiting pressures to fulfill its commitments (Asch et al., 2010; Moten, 2010; USAREC, 2013). Recruiting is vital towards supporting the Army with qualified and capable soldiers (USAREC, 2013; USAREC, 2014a;
Recruiting for the Army is not just about finding a body; recruiters have to find quality professionals and get them to join the organization (Batschelet, Ayer, & Runey, 2014 February; Griffin, 1996; Cortez, 2014; USAREC, 2013). “Fewer than one in four youth 17-24 years old are fully qualified for an Army enlistment” (USAREC, 2013, p.3). So no matter how motivated to serve an applicant is, if they do not meet the standards to serve, they cannot join. Unfortunately, those individuals of quality are becoming harder to find (USAREC, 2015).

At the micro level, prospecting is just one of the five areas of emphasis for Army recruiting, yet it is a crucial first step for successful recruiting (USAREC, 2011; USAREC, 2014a, b, c). At the macro level, effective prospecting is key toward keeping the AVM strong and is therefore responsible for maintaining an effective Army (Rynes & Barber, 1990; USAREC, 2014a, b; USAREC, 2015). A resilient Army is crucial for a successful America and continued worldwide stability (The Army Profession, 2014; USAREC, 2014a).

**Problem Background**

Recruiting is defined by the researcher Barber (1998) as, “those practices and activities carried on by the organization with the primary purpose of identifying and attracting potential employees” (p. 5). Recruiting is important to the health of any industry, educational institution, or military organization. Unfortunately, many recruiting practices have not changed for the last fifty years (Trost, 2014). In order for industry and education to remain competitive, modern, effective recruiting processes must be utilized (Wyatt et al., 2010; Zangilin, 2011).
Standard best practices are not known for all aspects of recruiting (Belch, Wilson, 
& Dunkel, 2009) and military recruiters are guessing what effective recruiting is (Cortez, 
2014; Latimore, 2014). Recruiting, in a comprehensive context for this study, needs best 
practices to undergo transformational change. The Army defines best practices as,

A best practice is an innovative technique or methodology using personnel, 
resources, or technology that has reliably achieved desired results. Best practices 
range from single actions and procedures to complex programs. They have been 
successfully applied at Army commands, or at other federal or private 
organizations. (“Concept for Sharing,” n.d., para 1)

**Recruiting Problem**

Recruiters indirectly keep America’s industry, education, and military 
commitments by seeking out the right quantity, quality, and diversity of the workforce 
(Cortez, 2014; Chow, 2012). The pressure for recruiters to support their organizations is 
significant (Batschelet et al., 2014 February). The military recruiter specifically has 
pressure to maintain an AVM in order to keep America’s worldwide commitments 
(Batschelet et al., 2014 February; Thompson, 2009; USAREC, 2014a).

The military needs effective recruiting in order to enlist the personnel necessary to 
keep America supplied with a strong and professional military (USAREC, 2011; 
USAREC, 2014a; USAREC, 2015). The recent recruiting policy and placement 
challenges have amplified with changes in how society works and gets its information. 
This, in turn, puts pressure on the Army, Army recruiters, and ultimately America (Trost,
2014; USAREC, 2013). Doing things the old way is no longer working (Covey, Merrill, & Jones, 1998; Rostker, 2007; Trost, 2014).

The competition for recruits creates a need to understand what effective recruiting functions are and what functions like prospecting need to be changed (Rostker, 2007; USAREC, 2014c). Other research findings suggest that current recruiting behavior is no longer working to accomplish the mission of recruiting (Batschelet et al., 2014 February; Trost, 2014).

Recruiting for the military has the distinct disadvantage of working in very different environments compared to private industry or education. The military competes directly with education for the limited pool of ideal candidates for military service (Cortez, 2014; Hogan et al., 2004). The military has primarily focused on high school seniors not going directly into college, who might wish to join the military for future college benefits (Rostker, Klerman, & Zander-Cotugno, 2014). However, today there is a greater focus on going to college for high school seniors than joining the military (Asch et al., 2004).

**Recruiting in the Army Problem.** “The United States Army Recruiting Command recruits the most qualified men and women in the Nation to serve as Soldiers” (USAREC, 2013 p. 3). In 2005, the Army Reserve was only able to recruit 77 percent of the personnel necessary to support its current Reserve strength, a sad reality that repeated itself as recently as 2015, when the Army failed again to make its Army Reserve recruiting goal (Asch et al., 2010; Batschelet, 2014, February 2; Moten, 2010; Rostker, 2007; Brook, 2015a). “Recruit quality fell between FY 2003 and FY 2008 while the services, particularly the Army, struggled to meet its overall recruiting goal” (Asch et al.,
Army leaders are asking for help in getting quality applicants interested in an Army career (Armor et al., 2004; Batschelet et al., 2014 February; Hogen et al., 2004). Recruiters are a major part of the military team providing quality applicants to all sectors of the military, yet they are under extreme pressure to perform. Far too many recruiters break under this pressure (Le Blanc, 2013, June; McChesney, 2009; Thompson, 2009). According to Le Blanc (2013, June), McChesney (2009), and Thompson (2009), this extreme pressure has caused recruiters to cut corners, participate in unethical behavior, or succumb to suicide. They have survived war and deployments away from home for months, even years at a time; however, they do not survive a recruiting tour (McChesney, 2009; Thompson, 2009). According to McChesney (2009), the Army is investigating a cluster of fifteen recruiters that killed themselves between 2001-2009. Unofficial reporting revealed recruiting to be one of the most stressful jobs in the military (McChesney, 2009).

Ineffective recruiting practices waste time, money, and resources (Cortez, 2014; USAREC, 2014c). “Army recruiters screen over 400,000 applicants annually to qualify the right applicants to become Soldiers” (USAREC, 2013, p.3). Yet only 89,000 actually enlist (USAREC, 2013). For the recruitment process to be effective, the Army Non Commissioned Officers (NCO’s) assigned to recruiting must have the assets, tools, and basic skills necessary to screen high school graduates, high school seniors, and those with specific qualifications (languages, professional skills) and show them that their unique skills and abilities are compatible for Army service. Best prospecting practices are one step in the right direction to identifying and describing effective recruiting in order to
relieve pressure on the recruiters and give them the tools necessary to fulfill enlistment goals (Cortez, 2014; Dertouzos & Garber, 2006a).

**Prospecting Problem**

Prospecting takes place at a “beginning” relationship level. Prospecting is essentially the first step of the recruiting process. The initial contact with the prospect in order to see if the Army and the applicant are compatible is prospecting (USAREC, 2015). Prospecting is defined as “an activity to contact leads and engage them in conversation with the intent to schedule an Army interview” (USAREC, 2011). According to Army doctrine, prospecting is the foundation of recruiting that is done in three different mediums: telephone, virtual, and face-to-face (USAREC, 2011; USAREC, 2014c; USAREC, 2015). The recruiters work for and receive tools from the organization in order to recruit (USAREC, 2015). Unfortunately, the tools that the recruiter uses are inadequately understood (Barber, 1998; Buddin, 2005; Dertouzos & Garber, 2006a). The Army is predicting that the tools used to recruit the military of today are inadequate for recruiting the military of the future (Batchelet et al., 2014 March). These organizational tools are internal policy/doctrine such as marketing, advertising, and public affairs (Barber, 1998, USAREC, 2015).

Other policies of recruiter selection have been researched extensively in both military and civilian sectors (Barber, 1998; Cortez, 2014; Sackett & Mavor, 2004). Yet research has not undertaken any comprehensive analysis of recruiting systems like best practices of prospecting (Cortez, 2014). The leading research related to the recruiting process of prospecting is person-organization fit (P-O) (Roberson, Collins, & Oreg, 2005). Finding the “best fit” individuals for meeting recruiting goals, or “unit
mission success,” is highly dependent on prospecting of possible candidates (Batschelet et al., 2014 February; USAREC, 2014b). Collins (2001) and Messmer (2011) conducted research to describe how P-O fit strives for a match with the organization so that the individual is compatible and motivated to serve the organization. Cortez (2014) argues that the responsibility to identify P-O best fit remains with the applicant because recruiting processes do not strive for best compatibility practices.

Ultimately, this P-O fit compatibility helps the organization and the applicant because it gives the organization motivated employees that assimilate easily into the organization’s culture (Cortez, 2014; Judge, Cable, and Higgins, 2000; Ziegert, and Ehrhart, 2004). The extensive research behind “P-O fit” relates to prospecting when considering an applicant after they have successfully joined the organization. This post recruitment research does not help recruiting practitioners understand best practices in prospecting for all of the future applicants who join/do not join or just give a referral.

With effective prospecting, recruiters have the ability to connect with people and try to help them become better—a key leadership principal (Sharma, 2010). Self-actualization and goal development can be a product of effective prospecting if a dynamic relationship is allowed to grow between the recruiter and the applicant (USAREC, 2011). Recruiting commanders must ensure optimal prospecting is being conducted by recruiters, yet there is no standard best practice in prospecting in literature to help show how optimal prospecting can be realized (Cortez, 2014).
There is debate in literature whether referrals are a form of prospecting (USAREC, 2015). The Army sees referrals as a lead source activity and not a form of prospecting, yet missions for referrals are similar to prospecting (USAREC, 2011). Industry sees referrals as a primary goal of prospecting (Broughton, 2012; Gagliardi, 2007). The prospecting parameters are not identified in Army literature, although recruiting leadership attempts to hold the recruiters responsible for prospecting in telephone, virtual, face-to-face, and referrals (USAREC, 2011; USAREC, 2014b, c). Though recruiters may gain enough prospects to fill the recruiting funnel, the techniques are not standardized and best practices are not identified to accomplish their recruiting objectives (Cortez, 2014; USAREC, 2014c; USAREC 2015).

According to USAREC, prospecting is vital to the success of recruiting (USAREC, 2011; USAREC, 2014b; USAREC, 2015). Whether it is telephone, virtual, face-to-face, or referral prospecting being conducted, the goal of prospecting is to find a qualified and motivated applicant for the job (USAREC, 2011; USAREC, 2015). Across industry, education, and the military, having effective prospecting processes is everyone’s objective for recruiting (Cortez, 2014; Trost 2014). “Effective prospecting directly supports mission accomplishment while ineffective prospecting consumes valuable resources and places the center mission at risk” (USAREC, 2015, p. 19). Finding best practices is needed so prospecting can improve the recruiting process, making it more effective and efficient for the individual and the organization (Collins, 2001; Messmer, 2011; USAREC 2011).
Problem Statement

For the last forty years, America has been a stabilizing force in the world with an AVM, but now the pool of qualified applicants is shrinking (O’Hanlon, 2013; Rostker, 2007; USAREC, 2013). Only one in four youth 17-24 years old are fully qualified for an Army enlistment (Batschelet et al., 2014 February; USAREC, 2013; Ybarra, 2015). The applicant standards to join are increasing while the pool of qualified people is decreasing (USAREC, 2013). The fight against terror is the lengthiest war by an AVM in U.S. history (Asch et al., 2010; Moten, 2010; USAREC, 2013). Soldiers have had to undergo several extended tours, multiple deployments, and face the constant threat of a faceless enemy. In order to deal with these threats, the Army needs a constant supply of new recruits (USAREC, 2013). In order to get those recruits interested in a military career, the Army needs effective prospecting practices (USAREC, 2014b; USAREC, 2015).

Clearly the need to change current recruiting strategies to adapt to changing times has never been more apparent than now because of the prolonged war environment, budget cuts, and a population that is becoming more unqualified for service (Batschelet et al., 2014 February; Paolozzi, 2013; USAREC, 2013; Ybarra, 2015). Army Recruiters of today are faced with some of the most changing and challenging times in recruiting history (McChesney, 2009; Thompson, 2009; USAREC, 2014b). For example, the wars in Iraq and Afghanistan create an increased demand for multiple tours in combat areas and quality recruitment shortages, while low retention causes the AVM to be fragile (Rostker, 2007). There were serious concerns that the Army would not make its active duty and reserve-recruiting missions in 2015 (Batschelet, Ayer, & Runey, 2014 March; Brook, 2015a; Ybarra, 2015). In the
end it made its active duty mission but failed to make its Future Soldier and reserve mission (Brook, 2015b).

Although numerous studies have identified successful recruiter traits and employee motivation in industry, education, and in the Army (Cortez, 2014; Murray, 2010), none have looked at empirical evidence to improve the art of prospecting with best practices. Prospecting is important research to conduct because it is a skill that needs constant planning, refinement, and begins the recruiting process (USAREC, 2015). Just like any skill, practice is needed in order to achieve mastery (Gladwell, 2008).

Recruiters are mandated to prospect by Army recruiter leadership (USAREC, 2014b; USAREC, 2015); however, there are no formal best practice prospecting research that will help improve recruiting (Cortez, 2014). The individual prospecting goals of recruiters are precarious and unfulfilled in many cases; they affect the United States Recruiting Command (USAREC) and its ability to keep its commitments to the Army (USAREC, 2014a). Army recruiters need best practices research in prospecting in order to satisfy the recruiting organizations goals for quantity and quality applicants (USAREC, 2014c). Army recruiting knows that prospecting is important and it is key for finding recruits (USAREC, 2014b; USAREC, 2014c; USAREC, 2015). America needs best practices in prospecting research so that the Army will remain fully mission capable, able to defend freedom by recruiting the right people with the right skills (Cortez, 2014; Griffin, 1996).
Purpose of the Study

The purpose of this Delphi study was to discover what the best practices are for implementing telephone, virtual, face-to-face, and referral prospecting, as identified by an expert panel of Army Recruiters when targeting 17-24 year olds.

Research Questions

The following questions will be investigated to address the purpose of the study during three rounds of interviews. Round I will be discovery, round II will be consensus building, and Round III will be implementing the best practices. The questions may change based on course correction resulting from the investigative inquiry methods of a Delphi study.

Delphi Round I (Discovery)

What are the prospecting best practices, as described by an expert panel Army Recruiters when targeting 17-24 year olds?

Delphi Round II (Consensus Building)

1. What are the most important planning best practices, identified in Round I when targeting 17-24 year old markets, as rated by an expert panel of Army Recruiters.
2. What are the most important lead sources best practices, identified in Round I when targeting 17-24 year old markets, as rated by an expert panel of Army Recruiters.
3. What are the most important rapport building best practices, identified in Round I when targeting 17-24 year old markets, as rated by an expert panel of Army Recruiters.
4. What are the most important goals/needs/interests best practices, identified in Round I when targeting 17-24 year old markets, as rated by an expert panel of Army
Recruiters.

5. What are the most important overcoming assumptions best practices, identified in Round I when targeting 17-24 year old markets, as rated by an expert panel of Army Recruiters.

6. What are the most important engendering a commitment best practices, identified in Round I when targeting 17-24 year old markets, as rated by an expert panel of Army Recruiters.

7. What are the most important overcoming barriers best practices, identified in Round I when targeting 17-24 year old markets, as rated by an expert panel of Army Recruiters.

**Delphi Round III (Implementing)**

1. How would the expert panel implement the identified telephone prospecting best practices, as most important in Round II, when targeting 17-24 year olds?

2. How would the expert panel implement the identified virtual prospecting best practices, as most important in Round II, when targeting 17-24 year olds?

3. How would the expert panel implement the identified face-to-face prospecting best practices, as most important in Round II, when targeting 17-24 year olds?

4. How would the expert panel implement the identified referral prospecting best practices, as most important in Round II, when targeting 17-24 year olds?

**Significance**

Currently researchers do not know what best practices of prospecting look like in today’s recruiting environment (Belvins, 2006; Cortez, 2014). The results from this
study will explore the important issue of reducing recruiting shortages by identifying what prospecting best practices are. “Recruiters base their choice of recruitment channel largely on subjective norms, and on their negative beliefs towards that method, rather than selecting the methods that are most successful, cost effective and efficient” (Parry & Wilson, 2009, p. 670). Leaders and managers need to understand best practices in prospecting so gaps in knowledge can be reduced. Identifying best practices in prospecting is one step in that direction. This study will add to the recruiting literature by developing best practice in prospecting theory.

Best practice research by Latimore (2014); McGrellis (2013); Pease (2012); Wyatt et al. (2010); and Zangilin (2011) identify the potential benefits of best practice research on business and human resource practitioners. There is currently very limited prospecting best practices research for the military. This proposal’s research will add to previous research of best practices and specifically speak to the area of prospecting for military organizations. The Army can directly use this research when developing the training needed to continuously adapt its recruiters to changing markets and standards (Paolozzi, 2013).

**Definitions of Terms**

**Theoretical Definitions**

For the purposes of this research, understandings of the following theoretical definitions for reference are below:

- *Appreciative Inquiry (AI)*: “Appreciative Inquiry suggests that we look for what works in an organization; that we appreciate it” (Hammond, 2013, p.5).
• *Emotional Intelligence (IE)*: “Four emotional intelligence skills pair up under two primary competencies: personal competence [self-awareness, self-management] and social competence [social awareness, relationship management]. Personal competence is your ability to stay aware of your emotions and manage your behavior. Social competence is made up of your social awareness and relationship management skills” (Bradberry & Greaves, 2009, pp. 23-24).

• *Person-Organization (P-O) Fit*: Applicants will accept a position in an organization if the organization and the person have similar values (Higgins & Judge, 2004a; Judge, et al., 2000; Johnson et al., 2008).

• *Signaling theory*: Signals transmitted during the recruitment process include how organizations transmit their messages, how those messages are received, and what the outcome is in perceived fit, benefits of the job, risk, and reward (Cortez, 2014; Karasek & Bryant, 2012).

• *Participative Decision Making Theory (PDM)*: A participative decision making process that has the ability to enhance employee and employer relationships that ultimately effects behaviors such as absenteeism, intention to quit, and job satisfaction through shared goal setting and motivation (Westheuzen et al., 2012).

**Operational Definitions**

For the purpose of this research, operational definitions of major variables and best practice terms are described below:

• “*Applicant*-A prospect who has agreed to process for enlistment or commissioning” (USAREC, 2014b, p. 80).
“Army interview-A formal meeting between a recruiter and a prospect for the purpose of telling the Army story and counseling them on the benefits of an Army enlistment or commission” (USAREC, 2015, p.43).

Assumptions – an assumption is a statement that is assumed to be true and from which a conclusion can be drawn; i.e., seek to understand, and follow on questions, restate the answer, etc., (Hammond, 2013).

Barriers- obstacles, inefficiencies or waste that prevents prospecting; i.e., poor training, no planning, no accountability, etc.

“Best practice-is an innovative technique or methodology using personnel, resources, or technology that has reliably achieved desired results (“Concept for Sharing,” n.d., para 1).

“Blueprinting-Any action to obtain specific information about leads, COIs, VIPs, or other persons” (USAREC, 2015, p. 43).

“Center leader-An officer or noncommissioned officer who leads the recruiting center. The center leader is responsible for recruiting operations; training and the welfare of the Soldiers and civilian employees assigned to the center” (USAREC, 2015, p. 43).

Counter-recruiters-Individuals or organizations that try and give an opposing viewpoint or statistical argument against the benefits of joining the military (Friesen, 2014).

Engender a commitment – produce obligation; i.e., identify goals and passions, asking for an appointment, etc.
• “Face-to-face prospecting-A prospecting activity where a recruiter attempts to make a face to face contact with a specific lead to schedule or conduct an Army interview” (USAREC, 2015, p. 43).

• “Follow-up-Any action is taken to reinforce an initial action. Typical follow-up can include contacting a COI to obtain a lead; contacting a prospect, the recruiter met at a school event to arrange an interview, or contacting a prospect already interviewed who wanted some time to think before making a decision” (USAREC, 2015, p. 44).

• Goals/needs/interests –information gathering in order to discuss the prospects essential objectives; i.e., active listening, open ended questions, scripts, etc.

• “Lead-A lead is a name with an address, telephone number, or email address” (USAREC, 2014b, p. 80).

• Lead sources-acquire principal contact resources that allows recruiters to have contact with prospects; i.e., high school list, college lists, marketing leads list, future soldier generated, etc.

• “Market share-Unit accomplishments in ZIP codes measured against the total percentage of the available recruiting area or market by categories” (USAREC, 2015, p. 44).

• Propensity-The potential for a group of people to want to enlist in the Army (USAREC, 2015).

• “Prospect-A person who has agreed to meet with an Army recruiter, or a person who has been interviewed but who has not committed to process for enlistment” (USARC, 2014b, p. 80).
- “Prospecting-An activity to contact leads through telephonic, face-to-face and virtual means to engage them in conversation with the intent to schedule an Army interview” (USAREC, 2015, p. 45).

- **Qualification Standards**-All enlistment standards are met in order for eligibility for Army service (USAREC, 2015).

- **Rapport** –mutual understanding, trust, and agreement between you and the prospect; i.e., ask questions, use of humor, agree on common interests, listen, etc.

- “Referral- A lead furnished to a recruiter by a prospect, applicant, Future Soldier, COI, VIP or other person with the intent that a recruiter will contact the lead to schedule an initial interview or follow-up for processing” (USAREC, 2011, p. Glossary-7).

- “Recruiting center-A recruiting facility comprised of recruiters who are trained and equipped to perform recruiting tasks” (USAREC, 2015, p. 45).

- “Recruiting Operation Plan (ROP)-Holistic plan designed to accomplish the mission and improve recruiting performance” (USAREC, 2014a, glossary-1).

- “School Recruiting Program (SRP)-A program designed to assist recruiters in evaluating school markets and directing their recruiting efforts toward specific tasks and goals in order to obtain the maximum number of quality enlistments possible” (USAREC, 2015, p. 45).

- “Social media-Web-based applications, which promote the creation and exchange of user-generated content. Prominent examples include Facebook, LinkedIn, YouTube, Twitter, Tumblr and Flickr” (USAREC, 2015, p. 45).
- Virtual prospecting-A prospecting method that uses email, social media and the Internet to contact individuals and engage them with the intent to schedule an Army interview (USAREC, 2015, p. 45).

**Delimitations**

In order to clarify the boundaries of the study, it is delimitated to only include expert Army recruiters that are assigned to leadership positions in during the year of 2016. The selected aspects of the prospecting problem will be looked at through the lens of expert Army recruiter leaders who have successfully prospected 17-24 year old applicants for future Army service in order to share their best prospecting practices.

**Organization of the Study**

The remainder of the study is organized into four chapters, a bibliography, and appendixes. Chapter II presents a review of what is known about recruiting, prospecting, Person-Organization (P-O) best fit, and best practice research. Chapter III explains the research design and methodology of the study. This chapter includes explanation of the population, sample and data gathering procedures, as well as the procedures used to analyze the data collected. Chapter IV presents, analyzes, and provides a discussion of the finding of the study. Chapter V contains the summary, findings, conclusions, and recommendations for actions and further research.
CHAPTER II: REVIEW OF THE LITERATURE

Reviewing ProQuest’s collection of literature regarding six centuries of human resources management (HRM) revealed 579,481 peer-reviewed journal articles, scholarly articles, dissertations, or books. However, when HRM is combined with recruiting, only 115,909 references are available. 923 peer-reviewed journal articles, scholarly articles, dissertations, or books were available when adding the topics of client prospecting.

Further literature review of the all-volunteer Military (AVM) returned 419 bodies of literature. By combining a search of U.S. Army, only 303 articles results were returned. However, when combining all the above with best-practice, only 49 articles were available. In further searching, and combining all topics of “HRM,” “recruiting,” “client prospecting,” “AVM,” “U.S. Army,” “best practice,” and “a Policy Delphi research technique,” there were only three peer-reviewed journal articles, scholarly articles, dissertations, or books available. This clearly shows a lack of available research in the current literature addressing how best practice research can be applied to U.S. Army prospecting (see Table 1).

Table 1

<table>
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<td>HRM + recruiting</td>
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<td>HRM + recruiting + client prospecting</td>
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<td>HRM + recruiting + client prospecting + AVM + U.S. Army</td>
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<td>HRM + recruiting + client prospecting + AVM + U.S. Army + best practice</td>
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<tr>
<td>HRM + recruiting + client prospecting + AVM + U.S. Army + best practice + Policy Delphi</td>
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There is a tremendous amount of literature to review in the broad categories of human resource management and recruiting (Barber, 1998; Cortez, 2014; Murray, 2010). Therefore, the recruiting literature review of this study will have three limitations. First, the scope of the research will be on recruiting through the lens of attracting quality individuals to an organization (Griffin, 1996; Rynes & Barber, 1990; Trost, 2014; United States of America Army Recruiting Command [USAREC], 2015), a quality individual being one who meets standards for the job but is not necessarily the absolute best person for the position (Asch et al., 2004; Barber, 1998; Hosek & Mattock, 2003). Second, the best practices of prospecting literature review will be studied from the organizational influence of the individual related to recruitment or job choice and not the broader topic of job search (Barber, 1998; Cortez, 2014; Murray, 2010). Finally, this literature review will be further restricted to those individuals who are recruited outside the organization (Barber, 1998; Rostker, Klerman, & Zander-Cotugno, 2014; Trost, 2014). An example of someone recruited inside the organization is an active duty enlisted soldier who recently graduated college and can now be recruited as an officer since they have the academic qualifications for the new assignment.

The current focus of research does not directly address the problem of identifying best practices in prospecting. The findings of previous research have identified a need for future research in recruiter training and development and how that can impact recruiting (Cortez, 2014; Pease, 2012). The purpose of this study will attempt to identify and describe best practices of prospecting so future research will impact recruiting for the positive.
In the following chapter you will be introduced to the literature of recruiting in business/industry, education, the military, and the department of the Army. The findings and conceptual framework of prospecting will be presented in business/industry, education, military, and the Army. The effects of a changing society, different markets, and the method in which to prospect in will be analyzed with regard to prospecting strategies in telephone, virtual, face-to-face and referral prospecting (Barber, 1998; Orvis & Asch, 2001; USAREC, 2015).

**Recruiting**

Researchers have identified how recruiting is important to the health of every organization and performs the essential function of providing human capital to the organization (Barber, 1998; Murray, 2010; Johnson et al., 2008). A recent literature review of Army recruiting doctrine identifies how it is especially important for an AVM that is tasked with the continued protection and freedom of the United States of America (USAREC, 2013; USAREC, 2014a, USAREC, 2014b, USAREC, 2015). Matyszak (2009) suggests military recruiting has been a worldwide challenge since the days of the Romans. Further research findings revealed that there are not enough qualified employees in industry, education, and the military (Rynes & Barber, 1990), yet, despite our technological advances, we are still using similar recruiting strategies to the Romans (Barber, 1998; Citarelli, 2006; Johnson, 2014; Matyszak, 2009, Trost, 2014). In order for recruiting in industry, education, and the AVM to continue being successful, innovative recruiting processes must be utilized (Batschelet et al., 2014 February; Trost, 2014; USAREC, 2015; Wyatt et al., 2010; Zangilin, 2011).
Recruiting can be broken into multiple phases: the generating applicants phase, of which prospecting is part; the maintaining applicant status phase; and the influencing job choice phase (Rynes & Barber, 1990; Trost, 2014; USAREC 2014b). According to Rynes & Barber (1990), most research has primarily focused on the applicant perception, generating applicants, and maintaining applicant phases. However, very little literature is available on what recruiters are doing to influence recruiting practices like prospecting (Barber, 1998; Rynes & Barber, 1990; Dertouzos & Garber, 2006a; Trost, 2014).

Moreover, attraction-related research has evolved across a variety of literatures, each of which has developed its own unique perspective of the attraction process. For example, industrial psychologists have focused on recruitment practices and applicant attitudes; economists have studied employment inducements and applicant behaviors; and sociologists have researched the social aspects of recruitment, job search, and early socializations procedures. (Rynes & Barber, 1990 p. 307)

Recruiting processes like prospecting have not been studied empirically, nor has standard best practices been identified for all phases of recruiting (Barber, 1998; Belch et al., 2009; Cortez, 2014). Moreover, military recruiters are guessing what effective recruiting is (Cortez, 2014; Latimore, 2014). There has been little human resource research on recruiting force productivity from the organization’s perspective (Barber, 1998; Cortez, 2014; Dertouzos & Garber, 2006b). Despite this, military recruiters are expected to indirectly keep America’s commitments by seeking out the right quantity, quality, and diversity for the military (Cortez, 2014; USAREC, 2013; USAREC, 2015). The pressure on recruiters to support the military and America is significant, but the U.S.
Military is no longer able to efficiently recruit volunteers using traditional means (Thompson, 2009; USAREC, 2014a; Batschelet, et al., 2014 March).

The two broad categories of past recruiting research that can be studied are applicant-centered and recruiter-centered influence on an applicant’s decision to join the organization (Barber, 1998; Cortez, 2014; Murray, 2010). These studies indirectly address the problem of recruiting but not the specific problem of finding best practices of prospecting in order to identify and understand recruiting in industry, education, and the military. “Improving the quality and reliability of [recruiting systems like prospecting best practices] research would have significant payoff in helping to provide the most efficient mix and level of existing recruiting resources” (Sackett & Mavor, 2004, p. 12).

The majority of generating applicant research has been conducted with the applicant-centered focus (Barber, 1998; Johnson, et al., 2008; Rynes & Barber, 1990). For example, researchers know a tremendous about which applicants to target, or what makes the applicants return after being recruited, but not much on what the recruiter can do to attract a better suited applicant (Barber, 1998; Blevins, 2006; Roberson et al., 2005; Ziegert & Ehrhart, 2004).

During times of recruiting challenges, all methods of recruiting personnel need to be taken into account (Cortez, 2014; Johnson et al., 2008). Recruiting and prospecting researchers need to understand the markets in which to recruit and identify best practices of prospecting in these markets (Asch, et al., 2004). The military needs effective recruiting in order to enlist the personnel necessary to keep America supplied with a strong military, for the U.S. Military can no longer afford a business-as-usual attitude
toward recruiting when the world is changing so quickly (Batschelet, et al., 2014 February; USAREC, 2013; USAREC, 2014a; USAREC, 2015).

**Recruiting in industry.** “The primary objective of recruitment is to attract future employees” (Barber, 1998, p.5). According to Zappe (2015), industry may have to work the hardest it ever has to attract future employees since the recession. Industry is poised to recruit more people than it has in the last seven years according to several recently published U.S. industry recruiting surveys (Zappe, 2015). This will make a very competitive market for recruiting talent. Industry is actively looking for someone to recruit who can not only sustain the business, but make the business profitable as well. The military is looking for someone who can be developed into a leader. Industry and the military are, then, looking for different kinds of skills (Yardley et al., 2012).

The military and private industries have similar recruiting problems but distinctly different working environments. Sackett and Mavor (2004) report how the military faces many more recruiting challenges than does private industry. For example, industry can hire someone with tattoos or someone who has been convicted of driving while intoxicated whereas the military cannot. As a result, recruiting studies in business and the existing inquiry from the professional literature will be biased towards private industries and therefore inadequate in a study of best practices for military prospecting (Sackett & Mavor, 2004).

**Recruiting in education.** According to Rappael (2013), education will be looking to recruit over half of their teachers within the next ten years due to a surge in retirements and potential teacher shortages. Education is now concerned with recruiting
where it was not before. Early education consisted of a one-room schoolhouse where a sole teacher was the teacher, administrator, janitor, and nurse (Ensign, 1923; Kalfa, 2009). Later in the 1800’s, schools became larger, and therefore, administrators and individual grade teachers were needed (Ensign, 1923). Nowadays we need a teaching work force with all the same skill sets as in the military and industry (Atha, 2009).

The military, however, is trying to prospect these very same individuals for possibly very serious and deadly actions. King (2003) and Smith (2012) found that the more educated a person is, the less confidence in the military they have and the more opportunities for gainful employment elsewhere exist for them. With this knowledge, the majority of military recruiting effort has historically been conducted in the high school market (Asch et al., 2004). “The military’s traditional recruiting market, namely high school graduates with no immediate plans to attend college, has been shrinking in relative size since 1980 as college enrollment rates among high school graduates have risen” (Asch et al., 2004, p. 1).

The majority of education recruiting research is from the applicant perspective (Barber, 1998; Rostker et al., 2014). For example, new teacher recruiting and retention research have identified that financial employment incentive programs mean less to newly hired teachers than a strong support network provided for them at the school (Milanowski, Longwell-Grice, Saffold, Jones, Schomisch, & Odden, 2009). If teachers are committed to their school, they recruit more among their teacher network and attrite less. Research identified by Milanowski et al. (2009) argues that money may be better spent on hiring quality principals than on financial incentive programs, reducing the need to recruit.
Researchers want us to know that recruiting has many common challenges in education and industry as in the military, though very different working environments (Batschelet, et al., 2014 February). Recruiting for the military has a distinct disadvantage compared to education because of the very different environments in which the prospect will have to work compared to private industry or education, but the pool of qualified people come from the same limited resources (Batschelet, et al., 2014 March; Rostker, 2007).

The most effective practices, in telephone, virtual, face-to-face, and referral prospecting as reported by an expert panel of Army Recruiters will address the beginning recruiting challenges of prospecting and look to identify military-centric ways to overcome them.

**Recruiting in military.** America was founded and has repeatedly relied on a compulsory military (Eikenberry, 2013; Hogan et al., 2004; Rostker, 2007). During times of relative peace it quickly went to a voluntary military and has oscillated between a mandatory service obligation (conscription) and an AVM (Bickseler & Nolan, 2009; Eikenberry, 2013; Rostker, 2007). The Militia Act of 1792 was the first Federal policy for volunteerism (Rostker, 2007). Volunteers operated in the Mexican War (1846-1848), between the Civil War and World War I, and in the Indian Wars and the Spanish-American Wars (Rostker, 2007). In contrast, every major war utilized conscription to solve its manpower needs. The Civil War (1863-1865), World War I (1917-1918), World War II (1945-1945), and the Cold Wars in Korea and Vietnam (1946-1947 and 1948-1973) were all manned with conscripted personnel (Eikenberry, 2013; Rostker, 2007). At
its height in WWII, conscription inducted over ten million men by the end of the war (Rostker, 2007).

The AVM is a relatively new concept in the history of the United States, initiated in 1973 (Eikenberry, 2013). During the Vietnam conflict there were vast amounts of civil unrest against the draft and an unjust war (Bailey, 2009), the origins of the current AVM was created by a Presidential commission to investigate an all-volunteer force. President Nixon leveraged Congress to agree to end the draft during the middle of the Vietnam War with clear opposition of senior Army generals and began the AVM as we know it today (Eikenberry, 2013; Rostker, 2007). According to Rostker (2007), the military leadership of the time argued that the AVM would lose its professional force since a draft forces talent into the military where a volunteer force would not. The President and his panel disagreed. “Since then, all branches of the military have relied on volunteers to meet their manpower needs” (Rostker, 2007, p. 111).

Critics of the AVM are active today, even with the last 42 years of current successes (1973-2015). Eikenberry (2013) discusses how the current AVM is lacking political ownership and congressional oversight. The AVM has distanced itself from political authority and accountability. In essence, the AVM’s success has shifted power and created a political force that needs to be reined in (Eikenberry, 2013). Eikenberry (2013) explains empirically that an AVM is five times more apt to engage in worldwide crises since there is less political risk with an AVM as there would be with a draft force. The political consequences of going to war with a drafted military are less substantial than with an AVM (Eikenberry, 2013). The other problem with the
AVM is the lack of congressional oversight where every President has ignored the War Powers Resolution and gone to war without Congress’s approval since the inception of the AVM (Eikenberry, 2013). Eikenberry (2013) reports that war is now an easier solution with an AVM since it is less politically risky going to war with an AVM than going to war with a draft.

Today’s American military is the largest AVM in the world (Rostker, 2007; USAREC, 2013). The Department of Defense (DoD) employed 2,965,800 civilian and military personnel in the 2014 fiscal year (U.S. Department of Defense, Office of the Assistant Secretary of Defense for Readiness and Force Management, 2014). The total uniformed military has 1.3 million full–time active duty personnel and another 800,000 part-time in the Reserves and National Guard (U.S. Department of Defense, Office of the Assistant Secretary of Defense for Readiness and Force Management, 2014). Only the recent successes of Operation Desert Storm in Iraq and Afghanistan have tested the AVM and shown the world that it is a professional and lethal force (Eikenberry, 2013). For the last 45 years, the military has relied on an AVM to maintain freedom for America and stability for the world (Rostker, 2007).

Researchers argue that the current AVM could not be recruited without federal government assistance by approving incentive enlistment bonuses, retention bonuses, military pay, family support, healthcare, and veterans benefits packages (Orvis & Asch, 2001; Asch et al., 2010; Rostker, 2007; Rostker, et. al., 2014). Another example of federal government policies to help with access to quality markets and maintaining an AVM is the No Child Left Behind Act of 2001 (NCLB). The Act allows access for secondary school recruiter visits and name and telephone address directory information
access for recruiters to potential markets (No Child Left Behind Act of 2001, 2002). The Solomon Act is similar, aimed at post-secondary schools, and it too allows recruiter access to directory information (Solomon Amendment, 1996).

The Federal government has many policies and programs designed to assist with maintaining adequate numbers of recruits for the AVM (Rostker, 2007). By far the majority of the research on how the current federal policy affects military recruiting is from the RAND Corporation (Orvis & Asch, 2001; Asch et al., 2010; Rostker, 2007; Rostker, et. al., 2014). “RAND Corporation is a research organization that develops solutions to public policy challenges to help make communities throughout the world safer and more secure, healthier and more prosperous. RAND is nonprofit, nonpartisan, and committed to the public interest” (“RAND Corporation,” 2015, About). The studies look at the policies and regulations that range from the draft, to selective service, to recruiter access (Asch et al., 2010; Rostker, 2007; Rostker, et. al., 2014). The peer-reviewed studies of the RAND Corporation demonstrate how recruiting policy research is conducted extensively and how recruiting practice research like prospecting is not understood (Cortez, 2014; Dertouzos & Garber, 2006a).

There is a significant amount of research available on how policy has affected military recruiting as an organization and how policy influences the individual in the organization (Orvis & Asch, 2001; Asch et al., 2010; Rostker, 2007; Rostker, et. al., 2014). “The behavioral sciences, among other relevant disciplines, can help us better identify and recruit those most suitable to serve in future complex operating environments” (Batschelet, et al., 2014 March, p. 41). However, there is limited
research on how to improve recruiting systems, such as with best practices in prospecting (Barber, 1998; Cortez, 2014; Orvis & Asch, 2001).

The recent recruiting policy and placement challenges amplified with the changes in society puts pressure on the AVM, Army recruiters, and ultimately America (Cortez, 2014). Doing things the old way is no longer working (Covey et al., 1998). According to USAREC manual 3-0 (2014), today’s recruiting problems cannot be solved by yesterday’s policy. The current state of an AVM stays manned at desired levels through a delicate balance of deployments verses Veterans benefits and the hard work of recruiters filling the recruiting funnel (Dertouzos & Garber, 2006a; Eikenberry, 2013; Rostker, 2007; USAREC, 2014c).

**Counter recruiting.** According to recruiting researchers, counter recruiters are applying more social pressure to change the military recruiter access acts. Anderson (2009) describes how counter recruiters are gaining political strength in order to challenge the federal recruiter access laws. This political influence is aiming to remove military recruiters from schools (Friesen, 2014). In fact, Anderson’s (2009) research pointed toward an increasingly supportive movement to distance and eventually remove military recruiting from schools. In some cases, entire states are opting out of military recruiting access acts (Anderson, 2009). Opting out denies military recruiters’ access to schools (No Child Left Behind Act of 2001, 2002). The recruiting access acts have been legally challenged in the past, and they may soon change in the future, making recruiting more difficult (Friesen, 2014).

**Recruiting cost.** The United States and its partner nations account for 80 percent of total global military spending (O’Hanlon, 2013). Researchers want us to
understand the political influences toward recruiting an AVM and to know that the fiscal resources are being spent in a reasonable manner that produces return on investment (Orvis & Asch, 2001; Asch et al., 2010; Rostker, 2007; Rostker, et. al., 2014). America spends more on maintaining the military than any other nation (O’Hanlon, 2013).

The traditional recruiting research in military pay, advertising, enlistment incentives, education, pay stability, and world travel, along with the work and planning of putting the right number of recruiters in the right areas, has been extensively studied (Dertouzos & Garber, 2006b; Rostker, 2007; Rostker et al., 2014). Batschelet, et al. (2014 February) identifies that economic expert’s claim that “soldiers’ pay is in the 90th percentile when compared to that of civilians with similar experience and education” (p.32). The average enlisted salary is $20,000-$50,000 more a year than the civilian equivalent with similar age and experience levels (O’Hanlon, 2013).

Recruiting researchers have concluded that spending the money to recruit the forces necessary for maintaining an AVM is expensive, but overall the expense is justified as a “must have” for recruiting the quality personnel needed for the AVM (Ash et al., 2010; Batschelet, et al., 2014 February; Barber, 1998; Buddin, 2005; Dertouzos & Garber, 2006b; O’Hanlon, 2013). For example, the Department of Defense spent $625 million in fiscal year 2008 for enlistment bonuses alone (Asch et al., 2010).

Buddin (2005) estimates the average expense to recruit each volunteer is $15,000. Ash et al. (2010) double that amount when factoring in the cost to pay for recruiters to recruit each applicant. “On a per recruit basis, the cost of a recruiter-based policy is $33,200 per recruit” (Ash et al., 2010, p. 32). Dertouzos and Garber (2006b) again
double that amount when looking at the cost for each quality recruit—up to $60,000 per recruit.

The majority of recruiting research is conducted primarily to justify the expense of these high-cost programs in order to understand their impact on the AVM (Dertouzos & Garber, 2006b). For example, a study by Dertouzos and Garber (2006b) identified the effects of military pay, enlistment bonuses, advertising/marketing, and retention bonus policy’s for attracting enough quality for the AVM.

These very expensive programs directly impact recruiting, though the development of relatively inexpensive prospecting best practices rules may assuage some of this burden (Rostker, 2007; Cortez, 2014). The current AVM recruiting systems are similar to the original ones of the 1970s (Trost, 2014). These systems have been relatively successful for the majority of the 45 years of the AVM, but will they remain so? Batschelet, et al. (2014 February) predict that the military will be unable to recruit the quality it needs to maintain an AVM in the future.

One unstudied resource is recruiting best practice research. This research explores recruiting systems like prospecting that can be improved for little to no cost (Cortez, 2014; Murray, 2010; Rostker, 2007). The most effective practices in telephone, virtual, face-to-face, and referral prospecting, as reported by an expert panel of Army Recruiters, are a low to no cost analysis of an essential beginning recruiting process. By understanding how to effectually prospect in the beginning recruiting process for 17-24 year old markets, a process that can have return on investment with minimal risk at essentially no political or fiscal cost can be developed.
**Recruiting in the Army.** The Army is the oldest branch in the military and the original service requiring a draft (Cortez, 2014; Rostker, 2007). The Army remains the largest branch of the military (USAREC, 2013). The Army contributes about 50 percent of all military strength to any of America’s objectives (U.S. Department of Defense, Office of the Assistant Secretary of Defense for Readiness and Force Management, 2014). The Army at its largest point in World War II, totaled six million personnel not counting the Army Air Forces (O’Hanlon, 2013), and today the Army alone has a combined active and reserve military of over one million personnel (Feidler, 2014; O’Hanlon, 2013). For the last six years, Army recruiters have been seeking an average of 89,708 personnel to fill their ranks and have been unsuccessful in accomplishing at least part of their recruiting mission in fiscal years 2005, 2010, and 2015 (Asch, et al., 2010; Brook, 2015; Rostker, 2007). There are currently 7,632 Army recruiters working out of more than 1,400 recruiting stations across America and overseas trying to fill the need for new employees (USAREC, 2013).

As the largest component of the military, the Army must remain efficient and effective by utilizing a strong recruiting program (Batschelet, et al., 2014 February; Cortez, 2014). The all-volunteer Army requires that current members of the Army enlist new members through a process known as “recruitment.” Recruiting research identifies how federal policy has affected recruiting quality, size of the military, and how recruiting policy can ultimately influence the pressure to recruit (Asch et al., 2004; Orvis and Asch, 2001; Rostker, 2007). The majority of military recruiting policy research is focused on the Army since it is the largest branch and what impacts the Army also trickles down to impact the other services (Asch et al., 2004; Orvis and Asch, 2001; Rostker, et al., 2014).
The AVM has, for the most part, been successfully recruiting the quantity of volunteers for the last 45 years (Asch et al., 2004; Asch et al., 2010; Orvis & Asch, 2001). However, in order to meet the recruiting quantity missions, the quality has been sacrificed. “Recruit quality fell between FY 2003 and FY 2008 while the services, particularly the Army, struggled to meet its overall recruiting goal” (Asch, et al., 2010, p. xiii). The quality and quantity of these new employees is very important to the Army and to the nation (Batschelet, et al., 2014 February; Cortez, 2014). Maintaining balance of quality with quantity is a difficult yet important challenge for military recruiters (Batschelet, et al., 2014 February; Batschelet, et al., 2014 March; Cortez, 2014).

The military has stress that other civilian organizations do not have. The increases in operational tempo for deployment into combat areas make the AVM fragile (Rostker, 2007). Rostker (2007) states how although the military is currently adequately manned at a balanced level, only time will tell whether the military can maintain balance. The slightest change with an increase of deployments, an increase in attrition, loss of retention, increase of employment competition, etc., could prevent recruiters from providing the human-capital necessary to maintain an AVM, therefore returning to the only other alternative there is: the draft (Batschelet, et al., 2014 February; Batschelet, et al., 2014 March; Cortez, 2014; Rostker, 2007).

Recruiting researchers warn that time may have already run out, for the Army is facing its first combined active and reserve missed mission since 2005, when the Army failed to meet its overall recruiting goal (Asch et al., 2010). Time is one thing recruiters do not have much of. The recruiters who are especially good at time-management are
also adept at recruiting according to the empirical research conducted by RAND Corporation researchers, according to Dertouzos and Garber (2006a).

The effective prospector is also an effective recruiter (USAREC, 2015). The art of recruiting is “adapting and applying dynamic interpersonal and leadership competencies and communication techniques with personal experiences to tell the Army story” (USAREC, 2014a, p.9). Recruiting has been compared to an art form (Miller & Zemke, 2005) and it needs constant study in order to maintain the all-volunteer Army the United States requires to ensure stability throughout the world (O’Hanlon, 2013).

**Operational imperatives.** The continuous nature of recruiting has enabled the Army to develop time tested operational imperatives that encompass *knowing your area of operations, knowing your competition, and knowing yourself* in order to accomplish the all-volunteer recruiting mission (USAREC, 2015; USAREC, 2014c). In order to research a comprehensive problem like prospecting, the literature review explored what operational imperatives strain recruiting systems like prospecting.

**Know your area of operations.** Research by USAREC (2014c) identified that operational environment is key in attracting applicants. A large group of applicants that are strategically targeted have a better chance of being recruited as opposed to other non-scientific methods (USAREC, 2014a, b, c; USAREC, 2015). Every resource must be leveraged and operational course corrections need to be made based on what is happening in the community that the Army recruiter is working in (Batschelet, et al., 2014 March; USAREC, 2014c). Recruiting is a moving target that demands continuous strategic planning. As the recruiting market changes, so too
should the recruiting strategy (Batschelet, et al., 2014 February; Batschelet, et al., 2014 March; Trost, 2014).

When recruiters target quality markets, they hope to prospect quality applicants. Since the inception of the all-volunteer service, high schools have been the central focus of recruiting (Rostker, et al., 2014). Recruiters have to select only the best people for service because only quality applicants can serve, for today’s Army recruits have to learn an exceptional amount of skills (Asch et al., 2010; Batschelet, et al., 2014 February; Griffin, 1996; Dertouzos & Garber, 2006a). Even the Army ground combat troops of World War II, who had the least amount of technical training of all the services, had to be able to understand and operate at least twelve weapon systems per person (Palmer, Bell, & Keast, 1948). Today’s Army is even more technical and has even higher standards (Batschelet, et al., 2014 February). For example, soldiers have to operate wirelessly controlled weapon systems with hand held computers.

**Know your competition.** The competition for quality recruits creates the need to understand what industry, education, and other DoD services are doing that make their organizations more appealing than a career in the Army (Batschelet, et al., 2014 February). Only by understanding what the competition is doing will the Army be able to adapt and thus win the battle of recruiting talent (USAREC, 2014c). Recruiting researchers recognize that recruiting is a process that requires constant assessment and change in order to adapt to a moving target (Orvis & Asch, 2001; Trost, 2014; USAREC, 2015).

**Know yourself.** Recruiters need to understand themselves in order to create breakthrough change in their organizations (Ackerman-Anderson & Anderson, 2010).
Recruiters need to understand how important they are in keeping America free by providing quality applicants, and that the extreme pressures to perform are urgent and necessary. Unfortunately, many recruiters do not understand themselves and far too many recruiters break under this pressure (Le Blanc, 2013; McChesney, 2009; Thompson, 2009). According to Le Blanc (2013), McChelney (2009) and Thompson (2009), this extreme pressure has caused recruiters to cut corners, conduct unethical behavior, or succumb to suicide. They have survived war and deployments away from home yet they do not survive a recruiting tour (Thompson, 2009).

Recruiting researchers have emphasized that in order for the voluntary recruitment process to work during times of stress and conflict, the recruiters assigned to recruiting must have the assets, tools, and basic skill sets necessary to help applicants understand that their unique skills and abilities are compatible with Army service (Rostker, 2007; USAREC, 2015). Requests for further research in recruiting processes that enable recruiters and applicants to understand themselves can help relieve recruiting stress on the organization and the individual (Orvis & Asch, 2001). Best practices in prospecting are one step in the right direction to relieve pressure on the recruiters and give them the tools necessary to use best practices in prospecting for recruiting goals (Cortez, 2014).

**Army recruiting functions.** The Army currently categorizes the recruiting process into eight functions. “The eight recruiting functions are: Mission Command, Intelligence, Prospecting, Interviewing, Processing, Leading Future Soldiers, Training and Leader Development, Sustaining Operations” (USAREC, 2014c p.3). These eight functions are the focus of recruiting and leaders utilize them in order to develop training
and focus the recruiting team (USAREC, 2015; USAREC, 2014c). “A deficiency in any one recruiting function can have a disproportionate effect on the outcome of the recruiting process” (USAREC, 2014c p. 20). The recruiting functions build on one another and represent key tasks that are essential to the recruiting mission (USAREC, 2015).

**Prospecting**

The Army defines prospecting as “an activity to contact leads and engage them in conversation with the intent to schedule an Army interview” (USAREC, 2011, p. Glossary-6). Business defines client prospecting as the search for potential customers or buyers that you hope to influence (“Prospecting”, 2015; Zell, 2012). The prospecting relationship is developed between an applicant and a recruiter in order to screen for basic qualifications and commitment (USAREC, 2015). It is assumed that the more people you prospect, the more people will ultimately agree to your offers (Krause, 2013). However if you do not have best practices and are repeating the same mistakes that assumption will not be untrue.

Prospecting’s continuous nature of influence happens in the very beginning of a relationship between a recruiter and an applicant (USAREC, 2014a; USAREC, 2014b; USAREC, 2015). A recent study by Maxwell (2005) suggested that, “The true measure of leadership is influence—nothing more, nothing less” (p. 4). Recruiting research like prospecting best practices is based in the social sciences, as are influence and relationships (Barber, 1998; Maxwell, 2005). Sharma (2010) argued the foundational principle of business is the business of people, how you connect with and mentor/coach in order to develop people.
Researchers have identified how there is a research gap in very early recruiting stages and actions of organizations and recruiters to influence applicants in those stages (Barber, 1998; Cortez, 2014; Orvis & Asch, 2001). Barber (1998) and Cortez (2014) state that recruiting has multiple requests for further research in the methodology of recruiting. The research identifies a problem with prospecting consistency. “98% of all salespeople don’t follow a consistent sales method. 87% of prospect inquiries are never followed up by a sales contact” (Krause, 2013, p. xii). The intent of this research is to look at prospecting practices and identify best practices of the Army recruiter in an Army organization.

**Prospecting in industry.** Industry prospects to make a sale or to fill a vacancy (Gagliardi, 2007; Trost, 2014). Industry recruiting begins with generating applicants from a pool that has been created or manipulated through targeted marketing (Barber, 1998; Trost, 2014). Industry values telephone, virtual, face-to-face, and referral methods to prospect (Broughton, 2012). Comprehensive empirical research agrees that failure to have effective recruiting processes can have significant, negative effects on business’s ability to adequately recruit new personnel (Khan & Mirsha, 2004; Wyatt et al., 2010).

A recent study by McGrellis (2013) identified a need for further research into how successful recruiters are consistently able to recruit the personnel necessary. Furthermore, the findings suggest that once the successful recruiters’ common practices are identified, they can be shared with leaders and human resource managers to be used in an ongoing effort to improve recruiting best practice (McGrellis, 2013).

Nonetheless, McGrellis (2013) and Trost (2014) admit that the recruiter perspective is underdeveloped in explaining an outcome of recruitment when considering
the system of prospecting in recruiting operations. There has been very little qualitative research on the specific recruiter-centered systems like prospecting in industry (Barber, 1998; Sackett & Mavor, 2004). Understanding recruiter leadership and how that leadership affects recruiter-centered systems like prospecting can reduce waste (Murray, 2010). Prospecting best practices will, therefore, increase understanding of the individual, the recruiter, and the business organization (Wyatt et al., 2010).

**Prospecting in education.** Education prospects for teachers with special skills, abilities, and cultural and gender diversity (Bryan & Ford, 2014; Waddell, and Ukpokodu, 2012). Education has a distinct need to prospect for teachers in order to maintain diversity and human capital objectives (Atha, 2009; Bryan & Ford, 2014). Rynes and Barber (1990) argue that in order to improve recruitment activities, you need to improve the initial application process. This will have the effect of enlarging the recruiting funnel and will reduce chokepoints, recruiting more as an outcome (Trost, 2014; USAREC, 2015).

Atha (2009) argues that attracting teachers is the hardest part of education recruiting, yet it is given the least amount of attention. Guarino, Santibanez, Daley, and Brewer (2004) conducted an extensive literature review on recruiting and retention of effective teachers in education. They focus on the applicant perspective and what policies are beneficial for recruiting effective teachers from this standpoint. Additionally, their findings identify how teacher recruiting policy research is relatively sparse from the organizational perspective (Guarino, et al., 2004).

A recent study by Wyatt et al. (2010) describes that the best way to improve an organization is to identify and design validated recruiting selection processes. “Schools
are autonomous, and every school’s organizational climate and structure is different” (USAREC, 2011, p. 6-1). Just as every school is different, every school recruits differently. Chow (2012) identifies no standard best practices in education recruiting practices. According to Zangilin (2011), by comparing hiring practices at public and private schools that are high performing and recommending best practices to be explored at low achieving schools, these low achieving schools may hope to attract more effective teachers who will, in turn, transition the school into higher performance.

Prospecting requires the art of attraction, especially when the applicant may have many opportunities available to them (USAREC, 2015). Extensive research has been conducted in education regarding attraction from an applicant perspective (Barber, 1998; Guarino, Santibanez, Daley, & Brewer, 2004). Research suggests that attraction is vital to the success of any organization (Barber, 1998; Rostker, 2007). Being able to get an applicant to see value in starting the application process is a key element to prospecting. Researchers agree that education needs validated recruiting processes like prospecting in order to improve education (Atha, 2009; Chow, 2012; Guarino et al., 2004).

**Prospecting in military.** Prospecting is a foundational process of recruiting selection (USAREC, 2015; USAREC, 2014a). The U.S. military is known for their ability to conduct extensive, comprehensive analysis and detailed planning in an attempt to “second guess” every possible outcome in order to outmaneuver an enemy (Yardley, et al., 2012). Yet the military has not undertaken any comprehensive analysis at the beginning process of recruiting-prospecting. “Well-planned and executed prospecting is the most reliable way to build a sufficient number of quality prospects to achieve the … mission” (USAREC, 2015, p. 19).
Prospecting in the Army. “The art of recruiting begins with that first contact—the first phone call, the first handshake, the first virtual response” (USAREC, 2011, p. 10-3). Prospecting is an activity that is conducted in order to rapidly screen applicants and generate interest in the Army for further commitment of an Army interview, which can develop into enlistment processing (USAREC, 2014a). The Army is in direct competition with the other services, industry, and education. Krause (2013), points out that “your competitors have virtually the same solution as you. It’s YOU the prospect is buying” (p. 7). In order to succeed in recruiting, the Army must engage in purposeful prospecting that is focused and comprehensive (USAREC, 2011).

Army prospecting is currently doctrinally identified as a foundational aspect to the Army’s recruiting of decisive operations (USAREC, 2014b). According to the U.S. Army’s recruiting command, educated and informed prospecting is the keystone to reliable recruiting (USAREC, 2015). Without effective prospecting, the recruiting mission will not be achieved. Prospecting completes the groundwork created by all the recruiting policies, national advertising campaigns, and incentives in order to begin the recruiting process (USAREC, 2015). Individual Army recruiters must take action to build relationships with individuals so that the significance of Army service is heard loud and clear (USAREC, 2014c).

The Army doctrine identifies prospecting as telephonic, virtual, and face-to-face (USAREC, 2011; USAREC, 2014a,b,c; USAREC, 2015). Referrals, according to the Army, are essential to recruiting but not a form of prospecting (USAREC, 2011; USAREC, 2014a,b,c; USAREC, 2015). Since industry states that referrals are the single
most important source of prospecting, they will be included into this best practice research (Broughton, 2012; Gagliardi, 2007).

Effective prospecting operations that ultimately lead the way to enlistment are an art form that requires effort and skill (USAREC, 2014a). “Prospecting puts recruiters in direct contact with prospects, influencers, and (very important people) VIPs” (USAREC, 2015 p. 19). Recruiters have to have listening skills, goal development, the ability to overcome obstacles, and the quick wit and judgment to either further pursue or terminate the relationship. Prospecting must employ the right message to the right audience at the right time in order to help the applicant and recruiter determine if the Army is a compatible fit (USAREC, 2011). Without prospecting, all other functions of recruiting are rendered inoperable, and “inadequate prospecting is a major cause of mission shortfalls” (USAREC, 2015; USAREC 2014b, p.44).

Extensive research on Army recruiting policy changes and their effects on recruiting has been undertaken, and a moderate amount of understanding exists on what attracts an applicant to the Army. The Army understands that prospects need to be made aware that their goals and the goals of the Army (job skill) are compatible so that the prospect will transition to applicant during the in-office or in-home interview (USAREC, 2015). Best practices in prospecting needs to be researched, allowing recruiters to become more effective and thus more clearly convey the message that Army service can be considered just as worthy as the alternative of college or trade schools, should the prospect meet Army standards (USAREC, 2013).
Ziegert and Ehrhart (2004) state how researchers who focus on attraction have emphasized that, no matter how good a product is, the product will never be sold if the recruiter does not have the ability to listen to the applicant. George and Simms (2007) cite how grateful people are when others listen, which becomes a powerful deposit in them. In addition, they found that active listening is one of the most important abilities of successful leaders, because people sense such individuals are genuinely interested in them and not just trying to sell them something. If the prospect is not willing to listen because there is no relationship, the goods will never be sold (Trost, 2014). Sinek (2009) defines successful leaders and organizations as those that can communicate not only with recruits, but also what they believe. The recruiters with these communication skills have the ability to build relationships, which are essential in conveying the shared goals of the Army and the prospect. Truly great recruiters have the ability to listen and make the prospect feel safe and part of something bigger than themselves, while also showing that they care about their wellbeing, all in a relatively short time (Trost, 2014).

Further research in applicant attraction explains how perceptions of an organization can create the perception of instant professional status for its employees. According to Beckwith (1997), the findings suggest that when selling professional services, recruiters do not have to convince the prospect that they are professionals because that is assumed based on their connection to the organization. The Army plans prospecting activities that specifically seek out and highlight professionals (USAREC 2014b; The Army Profession, 2014). The Army’s cultivation of a professional persona allows the soldier to have instant professional status within the eyes of the civilian
community (The Army Profession, 2014). The prospect cannot thoroughly evaluate the soldier’s expertise but nonetheless sees a professional soldier (The Army Profession, 2014).

Despite all this, it is building the relationship, and developing trust that requires the most work when prospecting (Beckwith, 1997; Krause, 2013; USAREC, 2014b). “Your prospects are conditioned to think you’re lying to them. Get their concerns on the table and addressed early in the process” (Krause, 2013, p. 40). Effective prospecting requires recruiters with enough personal candor to nurture relationships with their prospects so they will transition into committed applicants (USAREC, 2014a; USAREC, 2014b; USAREC, 2015). That relationship must be made whether the soldier is using face-to-face, telephonic, or virtual recruiting (USAREC, 2014c).

Both recruiters and applicants are humans and have biases. Since prospecting is a dynamic human relationship, recruiters need to be aware of both their own and the prospect’s, then seek balance between the two (George & Simms, 2007; USAREC, 2014a; USAREC, 2014b). Common applicant bias against the Army is that the Army is their last resort employer, one with low technology and no freedom (Schnack, 2012). Denning (2011) recognizes that authentic storytelling can overcome bias; recruiters need to share their stories in order to change perceptions. “Showing versus telling is the path to sales success” (Krause, 2013, p. 18).

Prospecting will stop if assumptions, barriers, or bias are not overcome through influence (Farooqui & Nagendra, 2014). Adkins et al. (1994) and Stahl (2007) state that both influence and the ability to be influenced will dictate whether or not a follow-
up interview will take place. Applicant bias may be a flawed assumption about the organization that prevents prospecting to be successful (Farooqui & Nagendra, 2014). Recruiter bias can also stop prospecting, as can applicant bias. If the recruiter has a flawed perception of the person-organization fit, then they will miss an opportunity of hiring someone even though they might be the best person for the job (Farooqui & Nagendra, 2014). Best practices are needed so that recruiters can understand the skills necessary to accurately assess an applicant’s quality of fit based on Army standards. Then the recruiter must develop a relationship with the prospect in order to identify if they have the potential to meet standards and commitments (Rosen, 2012). Army recruiters must possess the professional skills to selectively search, audit, and screen applicants for extremely technical jobs that might cost someone their lives if not done properly (USAREC, 2014c).

**Army prospecting funnel.** According to the Army’s recruiting command research, effective prospecting operations fill the recruiting funnel (Figure 2) (USAREC, 2014b: USAREC, 2015). The recruiting funnel needs to be large enough and flow smoothly enough to get the amount of recruits necessary to maintain Army missioning requirements (USAREC, 2014b).
In order to keep the funnel full, recruiters need to be skilled in the art of prospecting, which can be made more efficient and effective with training and decisive operations (Rostker, 2007). “The best prospecting method often depends on the local environment, availability of the target market, and the skills of the individual recruiter” (USAREC, 2015, p. 19). Efficient prospecting has the potential to bring the necessary people into the recruiting funnel to accomplish the mission. Ineffective prospecting results in wasted time, money, and resources. Poor prospecting is dangerous and has the ability to put the nation at risk (USAREC, 2015).

Army prospecting market. The market is key to finding what you are looking for (Whetstone, Reed, & Turner, 2006). If you want a quality market of people, you look at quality institutions. For example, if you are looking for high school graduates, you could look at post-secondary schools. If you are looking for high school seniors, you would prospect in secondary schools. If recruiters are looking for someone with special
skills, like a particular language, recruiters would go to the community where that language is spoken to prospect.

Recruiting research has identified that prospecting should be undertaken in markets with a propensity to enlist (Schnack, 2012; USAREC, 2014b). These markets traditionally come from 17-24 year olds (USAREC, 2014b). Whetstone et al. (2006), and Trost (2014) proposed that to be successful, recruiters need to utilize recruiting practices like prospecting in areas where others will not go. If the market is saturated in one particular area, then look for opportunities where few others are looking. The Army is marketing areas where there is a propensity to enlist based on past Department of Defense enlistment histories (USAREC, 2015). These markets include high school graduates, high school seniors, and those with special skills (USAREC, 2014b). However, in a 2014 study by RAND Corporation, 48 percent of recruits are joining the military later in life (Rostker, et al., 2014). These changes in the market warrant empirical research in order to identify strategies to adapt to such changes in the market.

Recruiting practices have transformed and are continually trying to adapt to changing markets and military requirements (Murray, 2010). Some of these changes include recruiter incentive programs and contact with high school students (Orvis and Asch, 2001). Army recruiters’ goals have changed: Individual recruiters are no longer rewarded for individual missions; instead, all recruiters who do well are missioned and rewarded (Orvis & Asch, 2001). Also unfortunate is the decrease in opportunities for recruiter contact with the military’s main market: high school students (Rostker, et al., 2014). The reduction of opportunities to contact a quality market could ultimately effect the ability of the Army to recruit enough quality applicants (USAREC, 2011). Orvis and
Asch (2001) warn, however, that no matter the reason for recruiting pressures, it will require more resources to recruit with a modern take, and human resource research needs to identify and understand best practice recruiting in order to overcome these challenges.

Prospecting in high schools or post-secondary schools is not without controversy. Anderson (2009) argues that recruiting should not be part of high school culture. Recruiters need to find balance in order to conduct prospecting in high schools and post-secondary schools. Identifying best practices in prospecting aims to help with finding that balance.

**Telephone prospecting.** According to Rackham (1998), telephone prospecting research conducted in the 1920s has not had much refinement since that initial research. The Army is currently active in telephonic prospecting and seeks best practices (USAREC, 2015).

The issue of telephone prospecting is discussed by Levesque (1996), who states that “tele-recruiting” was an acceptable medium in the 1990s among some of the larger companies who had a fairly consistent need to fill new and replacement jobs. Currently, the Army considers telephone prospecting a viable prospecting option with texting being one of the best methods to expand the telephone prospect market (USAREC, 2014b; USAREC, 2015).

Levesque (1996) also suggests that best practices in telephone prospecting should focus on contacting people employed in jobs similar to the one you are trying to fill. He identifies how important obtaining lists are, along with designing a script to the telephone phone call. The Army has unofficial and official telephone prospecting scripts that lead
prospects through questions quickly while getting their interest peaked in order to secure a commitment for an interview (USAREC, 2015). According to Levesque (1996) and USAREC (2015), the summary of an effective phone call is a descriptive conversation about the applicant’s skills and limitations in order to identify if they are a fit for the occupation. A successful phone call ends with arrangements for a follow up appointment or interview. This research aims to discover what recruiter best practices are in telephone prospecting for 17-24 year olds.

**Virtual prospecting.** “Virtual prospecting consists of contacting and engaging individuals through email, social media, and the Internet” (Behrend, Baker, & Thompson, 2009; USAREC, 2015, p. 21). Virtual prospecting is an ever-changing skill because the medium in which to market is constantly shifting (Badger, Kaminsky, & Behrend, 2014; USAREC, 2015). The opportunity to expose large audiences to one’s recruiting message exists with virtual prospecting (Johnson, 2014; Trost, 2014; USAREC, 2015). Virtual prospecting has the potential to deliver prospecting results (Krause, 2013; USAREC, 2015). Identified in a recent sales study by Krause (2013), up to “forty percent of Internet leads [will] convert eventually if they are consistently followed up” (p. xii). However, “little is known about the manner in which company web sites influence prospective employees” (Behrend et al., 2009, p. 123).

The newest method of prospecting is virtually (Badger et al., 2014). Originally hailed as the future of recruiting, virtual recruiting has not yet replaced other methods (Parry & Wilson, 2009; Trost, 2014). Virtual prospecting has become a common media platform for communicating with individuals through email, social media, and the Internet for industry and education through social media websites like Facebook,
LinkedIn, and Twitter (Behrend et al., 2009; Davison, Maraist, & Bing, 2011; Trost, 2014).

Current events in the media describe how terrorists may have effective strategies for dominating the virtual market of prospecting (Jenkins, 2011). RAND Corporation has extensively studied how Jihadist terrorism is successfully utilizing the virtual recruiting market (Jenkins, 2011). Jenkins (2011) describes how they are successful at building an army by recruiting over the Internet and how the rest of the world may learn something from them. Johnson (2014) explores how through the Internet, a recruiter is able to build a following so that when there is a job opening, the recruiter already has a ready pool of applicants (Trost, 2014). This is essentially what the terrorists are doing (Jenkins, 2011).

Denning (2011) suggests that there is power in social media when trying to tell a story and prospect. Social media has the ability to speak directly to your potential applicant through storytelling (Trost, 2014). Organizations that take advantage of virtual prospecting are able to defend against threats and take advantage of opportunities offered by social media (Davison et al., 2011). “Corporate storytelling in the twenty-first century is becoming less and less about the corporation telling stories and more and more about creating products and services that themselves catalyze customer stories of delight” (Denning, 2011, p. 111). These stories are often in the form of customer reviews. The Army currently does not have a system of collecting customer reviews (Cortez, 2014).

Davison, Maraist, and Bing (2011) encourage further understanding of best practices in prospecting-related research due to the persistent change in virtual recruiting. Virtual prospecting is rapidly changing and will continue to change (Behrend et al., 2009; Johnson, 2014). Most 21st century industries prefer to prospect virtually (Ehrhart,
Mayer, & Ziegert, 2012). The Army is currently utilizing virtual recruiting but has not conducted any best practice research on it, nor has it standardized the process despite wanting to actively engage in it (USAREC, 2015). Dieker et al. (2014), Jenkins (2011), and Whetstone et al. (2006) have identified the use of the Internet as the preferred method of recruiting though acknowledge a gap in knowledge about the Internet and prospecting.

According to Trost (2014), effective recruiting organizations have clear goals and objectives regarding virtual prospecting. The Army has a Virtual Recruiting Center (VRC) that manages “web based collaborative platforms and leverages multiple social media activities to support USARECs prospecting, processing, [and] Future Soldier and Family requirements” (Virtual Recruiting Center, n.d.). Under the umbrella of the VRC, the Army has a website (http://www.goarmy.com) for general information regarding recruiting but does not have a formal virtual prospecting strategy (Virtual Recruiting Center, n.d.). The VRC is in a reactive support mode. “Recruiting Command’s Virtual Recruiting and Social Media Center (VRC) on Fort Knox provides support for and expands the reach of recruiters nationwide through phone calls, emails, online chat rooms and, most recently, social media” (USAREC G3 Social Media Division, 2011).

The Army wants to increase the effectiveness of all prospecting (USAREC, 2014b). By understanding the benefits of virtual prospecting in today’s marketplace, commanders can guide their recruiters toward optimal prospecting techniques (USAREC, 2014c). This research aims to answer what recruiter best practices are in virtual prospecting as suggested by Army Recruiters to effectively target 17-24 year olds. In keeping with the development of virtual prospecting, this research will add to the body of knowledge in order to develop mastery in a new field. In order to be
effective, recruiters need to have all possible prospecting resources in order to
overcome obstacles and perform at levels necessary to ultimately keep their
organizations healthy and America great.

**Face-to-face prospecting.** Face-to-face prospecting is very successful for the
Army, but since it is so time consuming, it is the Army’s least preferred method of
prospecting (USAREC, 2015). Despite face-to-face prospecting being the most labor-
intensive form of prospecting, it has a high preference rate among civilian recruiters
(Whetstone et al., 2006). Aggressive face-to-face recruiting efforts at job fairs and
community gatherings were deemed more effective in education and police prospecting
(Dieker et al., 2014; Whetstone et al., 2006). The Army agrees with the civilian
recruiters that face-to-face prospecting is effective but labor intensive (USAREC 2014c;
USAREC 2015). This research aims to answer what recruiter best practices are in face-
to-face prospecting as suggested by Army Recruiters to effectively target 17-24 year olds.

**Referral prospecting.** Prospecting is all about referrals (Broughton, 2012). A
happy customer will become an advocate and refer their friends (Tracy, 2015; USAREC,
2011; USAREC, 2015). Referrals are missioned like other forms of prospecting
(USAREC, 2011). Referral prospecting is the most valued lead generation aspect of
prospecting, according to interviews with Army Recruiters, but very little empirical
evidence exists to support the success of referral prospecting in the Army. Referrals
generate similar quality prospecting of qualified applicants, according to the Army
Recruiting command (USAREC 2015). Qualified applicants have qualified friends and
associates who live, work, or congregate in the same general vicinity (USAREC 2015).
Recruiters ask for referrals when they meet with applicants, parents, friends, coaches, and
coworkers of the prospect. Recruiters strive to get a prospect to refer another “lead’s cell phone number, email address, hangouts and interests” (USAREC 2015, p. 21). This research aims to answer what recruiter best practices are in referral prospecting as suggested by Army Recruiters to effectively target 17-24 year olds.

**Studies Addressing the Problem**

Recruiting research is important to the health of organizations and also to the policy improvement between the recruiter and the individual recruit (Asch et al., 2010; Dertouzos & Garber, 2006a; Rostker, et al., 2014). Research has focused on specific recruiting policies and how they impact recruiting. Recent policy research has been conducted on cash incentives for the military (Asch et al., 2010), marketing policy (Dertouzos & Garber, 2006), college market (Asch et al., 2004), older youth (Rostker, et al., 2014), policy during times of war (Rostker, 2007), recruit characteristics (Buddin, 2005), and Cortez (2014) analyzed a case study of the Army recruitment process.

People make up organizations and spend a considerable portion of their lives working for and with the organization. Ensuring compatibility and fit is a real need in understanding human capital research (Khan & Mirsha, 2004; Roberson et al., 2005; Ziegert & Ehrhart, 2004). The general importance of applicant decisions and their reaction to recruiting in literature appears consistently in human resource management scholarly research (Barber, 1998; Roberson et al., 2005; Rostker, 2007).

Critics of recruiting research have said that it lacks theoretical research and is a complex multistage process that is too difficult to adequately study (Barber, 1998;
Many recruiting questions need to be addressed by empirical research. Rostker (2007) suggests more research is needed in the evaluation of beginning recruiting processes like prospecting.

Barber (1998) and Rostker (2007) argue that in order to silence the recruiting research critics, recruiting research should be conducted in basic social science contexts of various recruiting resources. By doing so, recruiting researchers are more apt to understand why the observed relationships exist, add to historic scientific validity of the relationship theories, and make a contribution to the literature of recruiting (Barber, 1998). The studies selected for this research problem are looked at through a theoretical social science lens. The leading social science research related to prospecting will be described in the next section of the literature review. The next section will be broken down into applicant-centered research and recruiter-centered research.

**Applicant-Centered Research**

A vast amount of research has been conducted on applicant reactions to recruiter practices, demographics, personality characteristics, and behaviors during the interview process (Buddin, 2005; Blevins, 2006; Orvis & Asch, 2001). Applicant-centered research is rich in content (Barber, 1998; Buddin, 2005). Several of the main theories that focus on recruiting from applicant-centered research are *person-organization fit, applicant attraction, signaling theory, and best practices* (Barber, 1998; Johnson et al., 2008; Judge, et al., 2000).

According to Rynes and Barber (1990) and Ehrhart and Ziegert (2005), applicant attraction theory applies for the recruiting research discipline. Industrial psychologists
have studied recruitment practices that affect applicant attitudes (Blevins, 2006); economists seek to understand employment incentives and how those incentives affect applicant behaviors; and sociologists have focused on job search, marketing, attrition, and early socialization procedures (Roberson et al., 2005; Rynes & Barber, 1990; Sawa & Swift, 2013).

**Person-organization fit (P-O).** According to Judge, Cable, and Higgins (2000), there has been significant interest in the past decade regarding improving the employment interview process with person-organization fit (P-O) research. Researchers emphasize that P-O research can be utilized to improve employee attrition and ultimately reduce workplace disciplinary actions (Farooqui & Nagendra, 2014; Judge and Cable, 1997). Improving our understanding of P-O recruiting could have a significant impact on applicant attraction and ultimately on organizations themselves (Blevins, 2006; Johnson et al., 2008; Higgins & Judge, 2004b). According to Judge and Cable (1997), improved P-O can reduce costs to the organization significantly through better matching recruitment efforts, resulting in improved long-term work attitudes, organizational commitment, and job satisfaction.

Finding the “best fit” individuals for meeting recruiting goals, or “unit mission success,” is highly dependent on the prospecting of possible candidates (USAREC, 2014b). The research behind “best fit” is the essence of prospecting and has been studied extensively from the applicant perspective. Collins (2001) and Messmer (2011) conducted research to describe how best fit seeks a match between individual fit and the organization so that the individual is compatible and motivated to serve the
organization. This fit compatibility helps the organization by introducing motivated employees that assimilate easily into its culture (Johnson et al., 2008).

Recruiting research critics are concerned by how P-O research is conducted with a segmented approach. “For example, applicants have their attraction measured as a result of the interview rather than applicants’ organizational beliefs” (Judge, et al., 2000, p. 400). Similarly, the researchers Ziegert and Ehrhart (2004) state that applicant exposure research is underdeveloped regarding attraction to a given organization.

Organizational research regarding a specific recruiting process like prospecting is understudied from the recruiter perspective (Barber, 1998; Dertouzos & Garber, 2006). “Little research has examined the influence tactics used by recruiters during the employment interview” (Higgins & Judge, 2004b, p. 631). Batchelet et al. (2014 March) explain the importance of research from the recruiter perspective to best compete for future talent. “Research will become more important in developing valid tools to identify, recruit and integrate those soldiers most qualified and suitable for the Army of 2020” (Batchelet et al., 2014 March, p.41).

**Applicant attraction.** Vocational psychology devotes much of its resources and studies in the field of career selection (Walsh & Savickas, 2005). Researchers are asking for more research to be conducted in the field of applicant attraction because of the critical impact of applicant attraction on an organization (Barber, 1989, Ehrhart & Ziegert, 2005; Rynes & Barber, 1990). Barber (1998) and Ehrhart and Ziegert (2005) each explain how a majority of the research is sporadically focused on employee actions after being hired, such as discipline and attrition. The influence of attraction on the wellbeing of the applicant and organization is given only a small mention.
The researchers Trost (2014), and Rynes and Barber (1990) found that applicant attraction should be studied during the entire recruiting cycle. Speed, transparency, and appreciation are specific applicant attractions strategies that impact a successful recruiting cycle (Trost, 2014). Understanding of organizational attraction during all stages of recruiting, such as submitting an application, undergoing interviews, and other minimum standard screening procedures, along with deciding which offer to take, would benefit recruiting research for both the applicant and the organization (Rynes & Barber, 1990; Trost, 2014). If bottlenecks, or trends of dissatisfaction and loss of qualified applicants, are identified in any of the recruiting stages, then the human resource practitioner can learn to modify practices so that attraction is improved in any deficient area, therefore reducing applicant losses (Rynes & Barber, 1990; Trost, 2014; USAREC, 2015).

**Signaling theory.** Signaling theory is defined by Barber (1998) as “the primary mechanism through which recruiter traits and behaviors are expected to influence applicant reactions to the interview is signaling” (p. 58). This concept is explained further by Behrend, et al. (2009) and the studies of Barber (1998), who expound how the sum of all sensory data from the recruiting message and interaction with the recruiter enabled the applicant to make a decision about possibly working for the organization. Signaling is both the result of this applicant and recruiter information reaction, and how people fill in the gaps in knowledge (Behrend, et. al., 2009; Ehrhart & Ziegert, 2005; Zell, 2012).

Researchers have identified how signaling theory can facilitate an improved understanding of how others perceive the recruiting message (Barber, 1998; Behrend, et.
al., 2009; Ehrhart & Ziegert, 2005). Although difficult to generalize applicant reaction to constantly changing applicant requirements and job characteristics needed to fill open positions, general observations can be made by studying signaling theory and applicant reactions (Judge, et al., 2000).

Karasek and Bryant (2012) identified how signaling theory research can impact management, psychology, and anthropology disciplines. “In effect, people sense that recruiters and other information gleaned during the job search process provide a signal of what it would be like to work for the organization under consideration” (Behrend et al., 2009, p. 343). Signaling theory researchers further developed a model of the relationship among information, influence, and perceptions of individuals about the organizations associated with the recruiter (Barber, 1998; Karasek and Bryant, 2012). However, signaling theory has not been researched in the current prospecting process of Army recruiting.

**Participative decision making theory (PDM).** Extensive research has been done in participative decision-making theory (PDM) with regard to job satisfaction, employee discipline, motivation, and attrition (Westheuzen et al., 2012). However, very little research with regard to PDM and how recruiting can benefit from it is available (Westheuzen et al., 2012).

PDM can influence human resource management policy development and also increase job satisfaction once hired (Lamb et al., 2002). Furthermore, the findings by Lamb et al. (2002) explain that PDM is needed now more than ever due to the workforce’s increased diversity, which can create workplace conflict if not properly understood. Diversity can also be a strength, offering many different ways for applicants
to see society and individual problems and priorities. Human resource selection of new employees will need PDM skills since individuals are going to be less willing to conform to organization standards, for the organization is also becoming more and more globally diverse (Lamb et al., 2002).

**Recruiter-Centered Research**

Much of the recruiter-centered research includes discoveries that are difficult to measure, replicate, or control (Cortez, 2014; Murray, D. A. 2010). A recruiter may be successful due to the economy, their personality, levels of motivation and energy, abundance of qualified candidates in their area, time management skills, or by shared demographics (Bicksler & Nolan, 2009; Dertouzos & Garber, 2006a; Griffin, 1996). Regardless of what factors amount to successful recruiting, without a recruiter there would be no recruiting. “As a result, the recruiter force is the most critical component of the military’s recruiting effort” (Bicksler & Nolan, 2009, p. 19).

Comprehensive recruiter analysis by Dertouzos and Garber (2006a) have identified that Army recruiters coming from technical, combat, or intelligence backgrounds are statistically more successful at recruiting than the other technical backgrounds. Those who are in their mid-twenties, married, and male are more productive recruiters (Dertouzos and Garber, 2006a). Recruiters attract people who are similar to themselves (Krause, 2013) and are “more productive when their characteristics are similar to those of many of the youth in their market areas” (Dertouzos & Garber, 2006a, pp. xvii-xix).

Since the field of industrial psychology is focused on career selection, it makes sense that the bulk of the research is individual-focused. However, this lopsided
approach to research is ineffective for improving military recruiting practices (Barber, 1998). The majority of recruiting research does not include the training and development of the recruiter, instead studying their traits, demographics, and perception (Barber, 1998; Cortez, 2014; Dertouzos & Garber, 2006a). Furthermore, little research has been done to understand recruiter leadership preferences, selection and placement policy, goal acceptance, performance measurement, and the impact of awards and punishment for not making recruiting goals (Cortez, 2014; Dertouzos & Garber, 2006a; Murray, 2010). Understanding how a successful recruiter prospects for applicants has not been studied in literature. Best prospecting practices have not been identified by real experience and history.

**Emotional Intelligence (EI).** Emotional Intelligence has been studied in over 500,000 people in the past decade to explore emotions (Bradberry & Greaves, 2009). Prospecting is a complex human relationship where emotions play an active role. By taking an EI test people are able to identify personal and social competencies. The competencies include self-awareness, self-management, social awareness and relationship management (Bradberry & Greaves, 2009). EI has not been recruiter-center studied yet much of the understanding would be applicable to developing prospecting best practices.

**Organizational Centered Research**

The minority of recruiting research is from the recruiting organization’s perspective (Barber, 1998; Batchelet et al., 2014 March; Cortez, 2014). The Army wants and desires organizational centered research. “Converting research into actionable talent acquisition tools necessitates early policy adaptation by senior Army
leadership and effective integration with the recruiting team” (Batchelet et al., 2014 March, p. 41). The Army desires a Recruiting University that can examine talent acquisition research and develop policy to train and educate recruiters (Batchelet et al., 2014 March).

**Appreciative Inquiry (AI).** Organizational-centered research explains how the organizational side of recruiting is a complex relationship between an individual and an organization where both need to work at finding common goals (Barber, 1998; Batchelet et al., 2014 March). AI looks at organizations best practices in order to focus on things that have historically worked (Hammond, 2013). AI research has helped organizations confirm knowledge, gain confidence, and increase awareness on what works (Hammond, 2013). This AI type of research aligns with best practices in prospecting research. Organizational recruiting research needs to be explored through all the internal and external recruiting processes for a better holistic approach to recruiting research (Barber, 1998; Batchelet et al., 2014 March; Dertouzos & Garber, 2006a). Manpower research must include the study of recruiting activities so that activities keep pace with the changes in society and prevent stagnation of human resource management policies (Batchelet et al., 2014 March; Dertouzos & Garber, 2006a).

**Best practice research (BPR).** Best practices research (BPR) refers to ways of thinking about what is working and why, then translating this learning and feedback into successful individual acts that can be understood and replicated at different sites/organizations (USAREC, 2014; Veselý, 2011). Researchers Zangilin (2011) and Latimore (2014) request more BPR be conducted so that recruiting plans can be
updated and included in the human capital strategic plan of the organization. The Army understands that in order to improve recruiting practices, best practice research must be used to identify how to best compete for future talent (Batchelet et al., 2014 March).

The reasoning for developing BPR is that best practices needs to be specific enough to prevent endless drifting from one good idea to the next (Kimsey-House, H., Kimsey-House, Sandoval, and Whitworth, 2011). According to Cortez (2014), recruiters are left to guess what best practices are as they try to standardize recruiting operations while continuously tailoring the sales strategy to applicants’ needs and interests. Latimore (2014) argues for an increase in BPR, recommending research into how quality new recruits were gained in one organization and sharing this information with other organizations so that similar best practices can be replicated. Recruiting best practices, then, is a moving target that needs consistent study (Cortez, 2014).

Critics identify a lack of clarity with BPR because it is a mixture of scientific and practical approaches (Veselý, 2011). BPR methodology does not guarantee that what we know about the given case is really true, for it lacks scientific rigor and theory (Veselý, 2011). They also say BPR lacks the ability to include external validity or be replicated since best practices are implemented in complex contexts and will not be the same at a different site (Veselý, 2011).

Recruiting BPR is understudied (Barber, 1998; Batchelet et al., 2014 March; Dertouzos & Garber, 2006a). Prospecting is a recruiting action that needs best practice development in order to understand what organizations can do to improve attraction to
the initial recruiting process. Whether from an individual or the recruiter standpoint, face-to-face, telephone, or virtual best practice prospecting research has not been developed. “Researchers must find ways to fill recognized gaps in the execution of the Army’s human capital strategy…” (Batchelet et al., 2014 March, p. 41). Identifying best practice recruiting actions in the different markets while using an array of mediums is a desired outcome of prospecting best practice research.

**Deficiencies in Past Literature**

There is substantial literature available from the past 20 years on the effects of recruiting and advertising policy on recruitment from the applicant perspective (Barber, 1998; Sackett & Mavor, 2004). Other areas of recruiter selection programs and policies have been researched extensively in military and civilian sectors (Asch et al., 2010; Rosker et al., 2014; Sackett and Mavor, 2004). However, many recruitment systems have not changed for 50 years (Trost, 2014). Modern recruiting practices research in a global labor market is needed in order to identify and describe what current influences affect recruiting (Batchelet et al., 2014 February; Batchelet et al., 2014 March; Trost, 2014).

Several recruiting policy studies have been conducted by RAND Corporation in order to define the effects of policy on recruiting processes for the Army (Asch et al., 2010; Budin, 2005; Dertouzos and Garber, 2006b; Rostker et al., 2014). The majority of research is focused on what the policies have done to applicants and their perceptions and reactions of the recruiting process (Barber, 1998; Dertouzos, & Garber, 2006a; Rostker et al., 2014). Broader topics of communication, human resources, motivation, and best fit have also been studied (Karasek & Bryant, 2014; Kecskes & Zhang, 2009).
However, in general, literature does not address how recruiter-identified best practice research in recruiting systems, like prospecting, are converted into policy that influences the applicants (Batchelet et al., 2014 March; Dertouzos, & Garber, 2006a). There have been several researchers who recommend further study in recruiter training, recruiting systems understanding, and future practice development based on empirical study (Batchelet et al., 2014 March; Cortez 2014; Dertouzos & Garber, 2006a; Sackett & Mavor, 2004).

Very few studies look at the beginning act of recruiting, which is prospecting (Barber, 1998). There is little empirical research on recruiting best practices in prospecting or on the actions of the recruiters to enhance that influence (Barber, 1998; Batchelet et al., 2014 March; Dertouzos & Garber, 2006a). Different markets in prospecting have not been studied in any population or been explored in past literature (Barber, 1998; Batchelet et al., 2014 March; Dertouzos & Garber, 2006a).

Some recruiting methods are more successful than others (USAREC, 2015). Effective prospecting directly supports the recruiting mission whereas unsuccessful prospecting puts the organization at risk, not having the human capital to accomplish its objectives (USAREC, 2015). Army prospecting is a key component to recruiting (USAREC, 2015), yet it is not actively studied (Cortez, 2014). Standards of prospecting are not identified in Army literature even though recruiting leadership is assigned responsibility to ensure prospecting techniques are accomplished to standard (Cortez, 2014; USAREC, 2014c).
Identifying prospecting standards is an inexpensive solution for an expensive problem of how to recruit the personnel necessary to keep the AVM manned (Batchelet et al., 2014 March; Rynes & Barber, 1990; Cortez, 2014). However, prospecting best practices is not validated, nor is it studied in an organized manner (Rostker, 2007). By developing standardized best practices in prospecting, the Army has the potential to improve their recruiters’ personal attributes in regard to a soldier’s talent for selling (Batchelet et al., 2014 March; Dertouzos & Garber, 2006a).

**Conclusions**

The American Soldier is part of the largest AVM in the world, and this type of military needs constant recruitment and effective prospecting in order to maintain America’s world commitments (USAREC, 2013; O’Hanlon, 2013; USAREC, 2015). Prospecting is the first step to keeping an all-volunteer Army healthy with the right quality and quantity of applicants (USAREC, 2014b). Therefore, the intent of this literature review is not to be a step-by-step guide to recruiting but to synthesize the understanding of what the most effective prospecting practices are in telephone, virtual, face-to-face, and referral as reported by an expert panel of Army Recruiters when targeting 17-24 year olds. The synthesized literature matrix is provided for Chapter II (see Appendix E.). In order to better understand recruiting, this research will focus on the key recruiting operation called prospecting (USAREC, 2014c).

Not only is there little understanding of the initial process of recruiting called prospecting, but also this research is important and timely because recruiting is difficult and planners are estimating even more difficult recruiting years in the future (Asch et. al., 2010; Cortez, 2010). If recruiters can become great at prospecting, the recruiting mission
can be made (USAREC, 2014a). Developing best practices in recruiting, like prospecting, will help achieve recruiting goals (Cortez, 2014; Dertouzos & Garber, 2006a). Whether in industry, education, or the military, the goal of having effective recruiting processes like prospecting makes sense (Cortez, 2014; Dertouzos & Garber, 2006a; USAREC 2014a). This research is a first step.
CHAPTER III: METHODOLOGY

According to the literature review, the military and its recruiters have essentially focused on the same recruiting practices as those applied at the inception of the all-volunteer military (AVM; Asch et. al., 2004; Orvis & Asch, 2001). The current recruiting systems are showing signs of stress, and soon they might not be able to attract the personnel necessary to maintain the AVM (Asch, et al., 2010; Cortez, 2014; Orvis & Asch, 2001; Rostker, et al, 2014). This study seeks to understand a complex human relationship recruiting process by discovering what best prospecting practices are.

Overview

In Chapter Three you will be introduced to a Policy Delphi Study. This study mixes both qualitative and quantitative research designs in a Policy Delphi Methodology. The study is accomplished in three sequential rounds (Turoff, 1970) with homogeneous expert groups, whose mode of operation is remote, anonymous, and computerized (Day & Bobeva, 2005; Sox, Crews & Kline, 2014). The rounds are sequential and the researcher and panel utilized online conferencing communications (Sox, Crews & Kline, 2014).

This chapter will discuss methodology in a structured narrative for implementing the study. The methodology section consists of the following sections: the purpose statement, research questions, research design, population sample, instrumentation, data collection, data analysis, limitations, and a detailed summary. Chapter IV will provide the research approach details and all of the data collection and findings from each step of this research.
Purpose of the Study

The purpose of this Delphi study was to discover what the best practices are for implementing telephone, virtual, face-to-face, and referral prospecting, as identified by an expert panel of Army Recruiters when targeting 17-24 year olds.

Research Questions

The following questions will be investigated to address the purpose of the study during three rounds of interviews. Round I will be discovery, round II will be consensus building, and Round III will be implementing best practices. The questions may change based on course correction resulting from the investigative inquiry methods of a Policy Delphi study.

Delphi Round I (Discovery)

What are the prospecting best practices, as described by an expert panel of Army Recruiters when targeting 17-24 year olds?

Delphi Round II (Consensus Building)

1. What are the most important planning best practices, identified in Round I when targeting 17-24 year old markets, as rated by an expert panel of Army Recruiters.

2. What are the most important lead sources best practices, identified in Round I when targeting 17-24 year old markets, as rated by an expert panel of Army Recruiters.

3. What are the most important rapport building best practices, identified in Round I when targeting 17-24 year old markets, as rated by an expert panel of Army Recruiters.

4. What are the most important goals/needs/interests best practices, identified in Round I when targeting 17-24 year old markets, as rated by an expert panel of Army
Recruiters.

5. What are the most important overcoming assumptions best practices, identified in Round I when targeting 17-24 year old markets, as rated by an expert panel of Army Recruiters.

6. What are the most important engendering a commitment best practices, identified in Round I when targeting 17-24 year old markets, as rated by an expert panel of Army Recruiters.

7. What are the most important overcoming barriers best practices, identified in Round I when targeting 17-24 year old markets, as rated by an expert panel of Army Recruiters.

**Delphi Round III (Implementing)**

1. How would the expert panel implement the identified telephone prospecting best practices, as most important in Round II, when targeting 17-24 year olds?

2. How would the expert panel implement the identified virtual prospecting best practices, as most important in Round II, when targeting 17-24 year olds?

3. How would the expert panel implement the identified face-to-face prospecting best practices, as most important in Round II, when targeting 17-24 year olds?

4. How would the expert panel implement the identified referral prospecting best practices, as most important in Round II, when targeting 17-24 year olds?

**Research Design**

This study uses a descriptive non-experimental research design (McMillian & Schumacher, 2010; Patten, 2012) in a Policy Delphi, thereby detecting patterns of best
practices in a complex human relationship. Expert Army recruiters who have performed and are currently training new recruiters in the art of prospecting will be asked to identify and describe best practices in prospecting.

In this study, inductive reasoning is used because it moves from specific observations to broader generalizations (Trochimi, 2006). This research’s inductive reasoning begins with specific observations in line with what is said regarding the purpose and research questions of Army recruiters performing prospecting operations in multiple environments: virtual, face-to-face, telephonic, and referral. It finishes after three rounds of comprehensive Policy Delphi research.

This study follows other Policy Delphi research and utilizes both qualitative and quantitative research (Peirce et al., 2012). It begins with qualitative questionnaires followed by a quantitative analysis with a Likert-style questionnaire (Appendices I-L) (Skulmoski, Hartman, & Krahn, 2007). A Likert scale is “a widely used questionnaire format developed by R. Likert” (Vogt, 2005, p.174). The qualitative Rounds (I and III) focus on discovering and developing an unknown best practice for future development of best practice theory and/or policy through the use of structured interviews and analysis (Peirce et al., 2012). Quantitative research is utilized in Round II (Figure 3) due to the need for statistical validity when studying best practices in the form of a rated scale (McMillan & Schumacher, 2010; Patten, 2012).

![Figure 3. Delphi round methodology. Three sequential rounds of mixed method survey instruments.](image-url)
Quantitative research methodology, although considered for use in this research as sole source of data collection, is inappropriate for this research study for many reasons. For one, this research is exploring a complex human behavior and needs the qualitative to identify best practices and quantitative to narrow the focus to identify trends (McMillan & Schumacher, 2010; Patton, 2002; Patten, 2012). Another reason a solely quantitative research approach is inappropriate is because traditional quantitative research selects large groups of anonymous participants where this research aims to select a purposive sample of expert individuals (Patton, 2002; Patten, 2012).

On the other hand, a purely qualitative study is also inappropriate for this study since the research is aligned to discover and implement a best practice. Qualitative is an excellent source of discovery but it lacks the ability to achieve consensus for a best practice. This study takes advantage of both qualitative and quantitative research in a Policy Delphi study methodology.

The Delphi model is selected for several reasons. First, the Delphi methodology will rigorously explore a complex human relationship that little is known about (Skulmoski, Hartman, & Krahn, 2007). There is very little empirical understanding regarding successful prospecting practices or phenomenon (Rynes & Barber, 1990). The second reason is that by selecting the Delphi method, a panel of experts can explore a multifaceted communication process and have the opportunity for group communication, feedback, and further exploration in an anonymous format (Linstone & Turoff, 2002; Okoli & Pawlowski, 2003; Stitt-Gohdes & Crews, 2004). Finally, the Delphi study methodology is selected because it can explore a complex human process in a
geographically dispersed population with little cost and inconvenience (Stitt-Gohdes & Crews, 2004).

Delphi practitioners describe three different structures in which to choose a Delphi Method: the Policy Delphi, Trend Model, and Structure Model (Linstone & Turoff, 2002; Stitt-Gohdes & Crews, 2004; Turoff, 1970). The Policy Delphi uses a panel of experts to deliberate on differing solutions to a specific policy. The Trend Model is utilized when a specific concern is analyzed by the group, and the group attempts to project future trends and outcomes (Stitt-Gohdes & Crews, 2004). The final Delphi structure is the Structural Model, where individual experts are encouraged to work through the Delphi structure in order to come together on a group consensus (Stitt-Gohdes & Crews, 2004).

Policy Delphi validity research conducted by Sandford and Chia-Chien, (2007) describes the Policy Delphi technique as a commonly used and accepted method for gathering data from expert respondents within their sphere of proficiency. This research is organized as a Policy Delphi, giving the expert panel an opportunity to identify and describe differing viewpoints (Turoff, 1970). Turoff, (1970) summarized that most Delphi can be conducted in three rounds. Properly designed Policy Delphi research develops consensus and opposing viewpoints by using open-ended questions with the intent of identifying emerging best practice methods in the form of electronic interview questionnaires (Creswell, 2014; Helmer, 1967; Sandford & Chia-Chien, 2007).

A Policy Delphi construct aligns with the purpose of this research in identifying and describing best practices in prospecting and allows the respondents the opportunity to react to differing viewpoints (Turoff, 1970). A study by Sandford and Chia-Chien,
(2007) determined that the Policy Delphi technique is appropriate as an approach for consensus building through its use of a series of questionnaires, delivered using multiple iterations to collect data from a panel of selected subjects. The Delphi type of structured communication process looks at how individuals attempt to accomplish their goals through specific behaviors in specific environments and consolidate divergent and convergent behavior in order to identify best practices (Linstone, & Turoff, 2011; Patten, 2012).

**Population**

The population is the group of individuals having at least one characteristic that the researcher identifies as compatible toward the research purpose or goals (Creswell, 2014; McMillian & Schumacher, 2010). The total Army recruiter population in the United States is 7,632 (United States of America Army Recruiting Command [USAREC], 2013). These Army recruiters are assigned to more than 1,400 recruiting stations across America and overseas (USAREC, 2013). This is an excessively large and spread out population not compatible for Policy Delphi research.

Creswell identifies the target population or sampling frame as the actual list of sampling units from which the sample is selected (2007). The target populations for this research are Army Recruiters whom are force sustainment 79R military operational specialty (MOS) designated. For example, there are 87 force sustainment 79R MOS Army recruiters in Central California yet only 42 79R MOS whom may poses all the selection criteria for an expert recruiter (see Figure 4).
A sample is defined as the “group of individuals from whom data are collected from within the target population” (McMillan & Schumacher, 2010, p. 129). According to Vogt, (2005) and McMillian and Schumacher, (2010), *purposive sampling* is a sample composed of subjects deliberately selected by the researcher in order to pinpoint certain characteristics that are representative of a population. In order to conduct this Policy Delphi study, the sample population will consist of purposefully selected expert recruiters. Creswell (2014) reported that in qualitative research such as this Policy Delphi study, a purposefully selected population is desired to help researchers select individuals who understand the research problem and best offer solutions to the research questions. According to Delphi research experts, the homogeneous Delphi population can range from seven to 60 participants (Day & Bobeva, 2005; Grisham, 2008; Turoff, 1970). Although there is no consensus of an optimal amount of homogenous Delphi population 10-15 participants is seen as sufficient (Hsu & Sandford, 2007).

This prospecting best practice research assembled a panel of 19 expert Army recruiters whom all had similar expert recruiter criterion selection standards. Nine of the experts were recruited for the study from Central California assigned to leadership positions in Fresno Army Recruiting Battalion, located in Central California. Cumulatively they manage a total component of 223 recruiters also assigned in Central California during the years of 2015-2016 (see Table 2). The remaining 10 expert

---

**Figure 4.** Population to sample.

**Sample**

A sample is defined as the “group of individuals from whom data are collected from within the target population” (McMillan & Schumacher, 2010, p. 129). According to Vogt, (2005) and McMillian and Schumacher, (2010), *purposive sampling* is a sample composed of subjects deliberately selected by the researcher in order to pinpoint certain characteristics that are representative of a population. In order to conduct this Policy Delphi study, the sample population will consist of purposefully selected expert recruiters. Creswell (2014) reported that in qualitative research such as this Policy Delphi study, a purposefully selected population is desired to help researchers select individuals who understand the research problem and best offer solutions to the research questions. According to Delphi research experts, the homogeneous Delphi population can range from seven to 60 participants (Day & Bobeva, 2005; Grisham, 2008; Turoff, 1970). Although there is no consensus of an optimal amount of homogenous Delphi population 10-15 participants is seen as sufficient (Hsu & Sandford, 2007).

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volunteers were referred from the Design Monitor Team. They were from the rest of the United States and are honorably discharged Army recruiter retirees.
Critics argue that this method of sampling is “generally an unwise procedure; it assumes that the researcher knows in advance what the relevant characteristics are; it runs the risk (because it is not random) of introducing unknown bias” (Vogt, 2005). In order to counter this argument, this researcher has conducted an extensive literature review in order to discover what the literature says about determining an expert (Okoli & Pawlowski, 2004; Hasson, Keeney & McKenna, 2000).

Although no set standard for selecting a panel of experts exists, there is a consensus in literature that experts should be capable contributors that are willing to commit to multiple rounds of revision and thought about their field of judgment (Hsu & Safford, 2007; Grisham, 2008; Linstone & Turoff, 2002). The panel of experts for this research comes from Army recruiting because of their experience and association with the discipline area-Army recruiting (Hsu & Safford, 2007). According to Grisham, (2008), the experts selected need to have impartial interest in the topic and have the resources available to commit to multiple rounds of questioning. Experienced Army recruiters understand recruiting systems like prospecting. They have been trained in the art of recruiting and are in a position of leadership to understand and identify trends in their areas of influence, the phenomenon under investigation (USAREC, 2014a). Expert Army recruiter leaders were competitively selected and placed into their positions of leadership by USAREC and the Recruiting Battalion Commanding Officer because of their experience.

Several members of the recruiting command are considered experts according to Army literature. Specifically, USAREC regulation 350-1 (2014d) Training and Leader Development states, “Battalion master trainers are the command’s training subject matter
experts (SME)” (p. 4). Additionally, literature includes the following experts: First Sergeants (1SG), for they “serve as the company’s training expert” (USAREC, 2014d, p. 5) and Center Leaders, who “are responsible to provide their Soldiers with training that enables recruiting success” (USAREC, 2014d, p. 5), Sergeant Major (SGM), Command Sergeant Majors (CSM) for they are the most senior enlisted, Military Entrance Processing (MEPS) Guidance Counselors, and operations noncommissioned officers (NCO), because they also train and direct the work of the force sustainment command (USAREC, 2014d; USAREC, 2015).

Best practices in prospecting will only benefit from experts who can identify and articulate it as a complex human communication process (Barber, 1998). The characteristics for selecting the panel of expert Army recruiting NCOs was derived from the literature review and validated by the design monitor team (DMT). Expert Army recruiters were selected for the Policy Delphi study using the following five criteria: (a) force sustainment-79R military occupational specialty (MOS), (b) over five years of experience in the profession of Army recruiting (Cortez, 2014; Snider, 2012), (c) in a position of influence: i.e., Center Leaders (CL), Battalion Master Trainers, Operations NCO, Military Entrance Processing (MEPS) Guidance Counselors, and Company 1st Sergeants (1SG) (Blanchard, & Barrett, 2011; USAREC, 2011; USAREC, 2014d), (d) senior NCOs are E-7 or above (i.e., Sergeant First Class (SFC), Master Sergeant (MSG), First Sergeant (1SG), Sergeant Major (SGM) and Command Sergeant Major (CSM; USAREC, 2014d; USAREC, 2015), (e) have completed advanced recruiter training, i.e., Recruiting Center Leaders Course (RCLC), Station Commanders Course (SCC), Center Leaders Course (CLC) (Dertouzos & Garber, 2006a; USAREC, 2014d). The
Demographic survey results will confirm that all 19 experts panel members and the DMT met all selection criteria previously mentioned for a purposeful cross-section of expert Army recruiters.

**Instrumentation**

The rationales for creating the instruments for Policy Delphi research are numerous (Day & Bobeva, 2005; Linstone, & Turoff, 2002). First, there are no existing instruments for conducting exploratory Policy Delphi prospecting best practice research. Second, the instruments could be remotely conducted, negating geographic distances between experts. Third, the instruments were selected because they can provide full anonymity of the expert panel. A summary table of Policy Delphi inquiry design for prospecting best practices is displayed in Table 3.

**Table 3.**

<table>
<thead>
<tr>
<th>Criteria:</th>
<th>Choice</th>
</tr>
</thead>
<tbody>
<tr>
<td>Purpose of the study</td>
<td>Exploration</td>
</tr>
<tr>
<td>Number of rounds</td>
<td>3</td>
</tr>
<tr>
<td>Participants</td>
<td>19</td>
</tr>
<tr>
<td>Mode of operation</td>
<td>Remote operation</td>
</tr>
<tr>
<td>Anonymity of panel</td>
<td>Full</td>
</tr>
<tr>
<td>Communication media</td>
<td>Computerized</td>
</tr>
<tr>
<td>Concurrency of rounds</td>
<td>Sequential set of 3 rounds</td>
</tr>
</tbody>
</table>

*Note.* Table is modified from *Taxonomy of Delphi Inquiry designs* Day & Bobeva, 2005.

The instruments used to collect data utilized an electronic interview questionnaire using max.gov via Outlook email correspondence. Survey instruments were produced in max.gov (Appendices I-L), an approved platform for Army and DoD security requirements. Max survey is based on a “best-of-breed” open source survey tool called LimeSurvey (“Max Survey,” 2015, Help). No federal funds, payments, incentives, or
gifts were given to the respondents or potential respondents to encourage completion of the surveys (Creswell, 2014; Peirce et al., 2012; Turoff, 1970). This electronic medium was selected to speed up the process and overcome geographic challenges (Cox, Crews & Kline, 2014; Day & Bobeva, 2005).

The demographic instrument is designed to qualify the expert panel by validating the selection criteria. Round I instrument is designed to discover the best prospecting practices of the seven operationalized terms for 17-24 year old markets. Round II is designed to be a quantitative consensus building instrument by rating of identified themes generated from Round I data analysis and transition to Round III with a consensus best practice identified. Round III qualitatively explains implementing the previously identified very important data of Round II (see Table 4).

Table 4.

*Policy Delphi Questionnaire Descriptive Table*

<table>
<thead>
<tr>
<th>Instrument Methodology:</th>
<th>Data Collection:</th>
<th>Data Analysis:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Demographic Questionnaire (Quantitative) Validation</td>
<td>1. Structured pilot tested questions.</td>
<td>Simple descriptive statistics displayed in tabular form.</td>
</tr>
<tr>
<td></td>
<td>2. Multiple choice, yes/no.</td>
<td></td>
</tr>
<tr>
<td>Questionnaire Round I (Qualitative) Discovery</td>
<td>1. Structured pilot tested questions.</td>
<td>Information presented in themed tables.</td>
</tr>
<tr>
<td></td>
<td>2. Open ended questions.</td>
<td></td>
</tr>
<tr>
<td>Questionnaire Round II (Quantitative) rate degree of importance by consensus.</td>
<td>1. Structured pilot tested questions.</td>
<td>Simple descriptive statistics displayed in tabular form.</td>
</tr>
<tr>
<td></td>
<td>2. Rated importance.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>3. Likert scale of very important, important, slightly important and least important.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>2. Open ended questions.</td>
<td></td>
</tr>
</tbody>
</table>

Notes: All surveys were created on max.gov and a link was sent on email.
The content of Round I consisted of seven guiding questions that began the discussion of what the most effective prospecting practices are in the seven operationalized terms: (a) planning practices, (b) lead sources, (c) establishing rapport, (d) identifying goals/needs/interests, (e) overcoming assumptions, (f) engendering a commitment, and (g) overcoming barriers (see Table 5).

Table 5.

**Round I Guiding Questions Plus Operationalized Terms**

<table>
<thead>
<tr>
<th>Question and prospecting median: telephone, virtual, face-to-face and referral prospecting</th>
<th>Planning Practices</th>
<th>Lead Sources</th>
<th>Establishing Rapport</th>
<th>Identifying goals/needs/interests</th>
<th>Overcoming assumptions</th>
<th>Engendering a commitment</th>
<th>Overcoming barriers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Q1/all</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Q2/all</td>
<td></td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Q3/all</td>
<td></td>
<td></td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Q4/all</td>
<td></td>
<td></td>
<td></td>
<td>X</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Q5/all</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Q6/all</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Q7/all</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>X</td>
</tr>
</tbody>
</table>

*Note. Table is modified from: Your opinion, please! How to build the best questionnaires in the field of education. Cox & Brayton-Cox, 2008. All is the median in telephone, virtual, face-to-face and referral prospecting.*

A common problem with Policy Delphi research is delivering a poor instrument for understanding the interpretations of the evaluation scales utilized in the research (Turoff, 1970). This research attempts to produce data in order to understand what the expert panel identifies as an important best practice. Covey’s (2013) research identifies how important things can also be unreliable/unproductive or non-urgent. These non-urgent things are often mistakenly identified as essential. The Likert degrees of importance in Round II is defined by the author Turoff (1970) as:
Very important—a most relevant point, first-order priority, has direct bearing on major issue, or must be resolved, dealt with, or treated. Important—is a relevant to the issue, second-order priority, significant impact but not until other items are treated, or does not have to be fully resolved. Slightly Important—insignificantly relevant, third-order priority, has little importance, or not a determining factor to major issue. (p. 87)

Least Important is defined as least priority, least relevance, least measurable effect, or could be dropped as an item to consider (Turoff, 1970). Round II instrument is designed to explore consensus by rating the prospecting practices degree of importance and to rate the degree of confidence identified in Round I for 17-24 year old markets. The content of Round II consisted of seven guiding questions that rated the most important operationalized terms for prospecting that were identified in Round I (see Table 6).

Table 6.

*Round II Guiding Questions: Plus Operationalized Terms*

<table>
<thead>
<tr>
<th>Questions applicable to all prospecting median: telephone, virtual, face-to-face and referral prospecting</th>
<th>Planning Practices</th>
<th>Lead Sources</th>
<th>Establishing Rapport</th>
<th>Identifying goals/needs/interests</th>
<th>Overcoming assumptions</th>
<th>Engendering a commitment</th>
<th>Overcoming barriers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Q1/all</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Q2/all</td>
<td></td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Q3/all</td>
<td></td>
<td></td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Q4/all</td>
<td></td>
<td></td>
<td></td>
<td>X</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Q5/all</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Q6/all</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Q7/all</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>X</td>
</tr>
</tbody>
</table>
Note. Table is modified from: Your opinion, please! How to build the best questionnaires in the field of education. Cox & Brayton-Cox, 2008. All is telephone, virtual, face-to-face and referral prospecting processes.

Round III is designed to identify the most important prospecting best practices implementation strategy for telephone, virtual, face-to-face, and referral prospecting in: planning practices, lead sources, establishing rapport, identifying goals/needs/interests, overcoming assumptions, engendering a commitment, and overcoming barriers (see Table 7). The content of Round III consisted of 7 guiding questions that previously rated very important from Round II by the expert panel. In summary, Round III takes what Round II identified as consensus and describes the implementation strategies for the different telephone, virtual, face-to-face, and referral prospecting methods.

Table 7.

Round III Guiding questions: Plus Operationalized Terms

<table>
<thead>
<tr>
<th>Question and prospecting median: telephone, virtual, face-to-face and referral prospecting</th>
<th>Planning Practices</th>
<th>Lead Sources</th>
<th>Establishing Rapport</th>
<th>Identifying goals/needs/interests</th>
<th>Overcoming assumptions</th>
<th>Engendering a commitment</th>
<th>Overcoming barriers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Q1/telephone</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Q1/virtual</td>
<td></td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Q1/face-to-face</td>
<td></td>
<td></td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Q1/referral</td>
<td></td>
<td></td>
<td></td>
<td>X</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Q2/telephone</td>
<td></td>
<td></td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Q2/virtual</td>
<td></td>
<td></td>
<td></td>
<td>X</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Q2/face-to-face</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Q2/referral</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Q3/telephone</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Q3/virtual</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Q3/face-to-face</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>X</td>
<td></td>
</tr>
</tbody>
</table>
The table below shows different options for referral and their preferences:

<table>
<thead>
<tr>
<th>Question</th>
<th>Preference</th>
</tr>
</thead>
<tbody>
<tr>
<td>Q3/referral</td>
<td>X</td>
</tr>
<tr>
<td>Q4/telephone</td>
<td>X</td>
</tr>
<tr>
<td>Q4/virtual</td>
<td>X</td>
</tr>
<tr>
<td>Q4/face-to-face</td>
<td>X</td>
</tr>
<tr>
<td>Q4/referral</td>
<td>X</td>
</tr>
<tr>
<td>Q5/telephone</td>
<td>X</td>
</tr>
<tr>
<td>Q5/virtual</td>
<td>X</td>
</tr>
<tr>
<td>Q5/face-to-face</td>
<td>X</td>
</tr>
<tr>
<td>Q5/referral</td>
<td>X</td>
</tr>
<tr>
<td>Q6/telephone</td>
<td>X</td>
</tr>
<tr>
<td>Q6/virtual</td>
<td>X</td>
</tr>
<tr>
<td>Q6/face-to-face</td>
<td>X</td>
</tr>
<tr>
<td>Q6/referral</td>
<td>X</td>
</tr>
<tr>
<td>Q7/telephone</td>
<td>X</td>
</tr>
<tr>
<td>Q7/virtual</td>
<td>X</td>
</tr>
<tr>
<td>Q7/face-to-face</td>
<td>X</td>
</tr>
<tr>
<td>Q7/referral</td>
<td>X</td>
</tr>
</tbody>
</table>

*Note. Table is modified from: Your opinion, please! How to build the best questionnaires in the field of education. Cox & Brayton-Cox, 2008.*

**Design-Monitor Team/Reliability and Validity**

A Design-Monitor Team (DMT) adds expert design, monitoring, and reliability to the Policy Delphi (Turoff, 1970). Turoff, (1970) states that successful Policy Delphi process requires the pretesting of instruments for validity and reliability. Since qualitative research is used in this study, internal validity strategies of peer examination is designed into this research (Roberts, 2010). McMillian and Schumacher, (2010) maintain validity rests on the technique and analysis of data collection. To ensure validity and reliability for the instruments used in this study, a DMT was created to eliminate
researcher bias by ensuring the instruments are accurately measured for what they are intended (Turoff, 1970).

According to an extensive literature review, validity is achieved by creating a DMT of at least two Army recruiter experts who are not part of the population who will vote on the instrument questions (McMillian & Schumacher, 2010; Turoff, 1970). For the purpose of this Policy Delphi research there will be three expert DMT participants. The DMT will meet all the same criteria as the purposeful population of expert recruiters. The specific goals of the DMT for this research are to pretest research questions for clarity and understanding, avoid compound questions, recommend alternatives to compound questions, and design sample responses that are short, specific, and singular in nature. One of the first validity tasks of the DMT is to operationalize the terms of prospecting.

Enhancing content validity for the results is accomplished by aligning and scrutinizing the instruments (Appendices I-L). The research questions guided each round of Policy Delphi development. In order to begin the study with guiding questions that are relevant for Round I, a formal process developed by the DMT utilizing the following three sources: “1. Dialoguing with colleagues and significant stakeholders; 2. Reviewing the literature to see what specialists in the field say about the issue; 3. Consult directly with three or four experts in the field to obtain their insights” (Cox & Brayton-Cox, 2008, p. 3). The DMT operationalized the guiding questions by selecting clear terms that answer the research questions by designing an inverted funnel. The top of the funnel represents the research question (Stage 1; see Figure 5).
“The opening at the bottom of the funnel represents expansion of the question to evoke meaningful, detailed responses” (Cox & Brayton-Cox, 2008, p. 5). Seven relevant and clear operationalizing guiding terms were developed by the DMT by a formal process of three sources in order to align the best practices research with what is involved in prospecting: planning practices, lead sources, establishing rapport, identifying goals/needs/interests, eliminate assumptions, overcoming obstacles, and engendering a commitment. All of these aspects are aligned with the purpose statement of this research.

The DMT members looked critically at the instrument results after each round, ensuring that the exact participant language used in creating the subsequent rounds to ensure the participants were quoted, verbatim, what best practices in prospecting are (McMillian and Schumacher, 2010). NVivo was used to organize the data into nodes (codes) in order to identify themes and patterns so trends could be identified (NVivo, 2016). “Coding is the process of organizing the material into … segments of text and assigning a word or phrase to the segment in order to develop a general sense of it”
NVivo is a software program that helps researchers organize their data (NVivo, 2016). Cross-checking is implemented during the rounds by the DMT to obtain validated understanding of participant’s answers. The DMT participants were asked to review the researcher’s synthesis and explain divergent results for each round of questions. Finally, the DMT validated the summative statements in the final results section of the research in Chapter V.

**Inter-coder Reliability**

In addition to the DMT reliability, this best practice research will use another peer-researcher to check the coding and interpretation of the qualitative field summary survey results to ensure accuracy of themes from the coding. While using the coding software NVivo, inter-coder reliability will be accomplished by having the primary researcher code the data and then have the peer-researcher double-code one of the seven (14.28%) survey questions for Rounds I and III. The goals of consensus are to be within 70% since this is exploratory research.

**Pilot Testing**

A locally conducted pilot test assisted with content validity. Pilot testing helped in the development and alignment of the Demographic Survey, Round I, Round II and Round III. All four surveys were field-tested prior to use in Hanford, California with a local Army recruiting center.

**Data Collection**

In order to conduct research, the researcher had to go through multiple institutional review boards (IRBs) or independent ethics committees to ensure no harm to human subjects. After Brandman University IRB approval, Army Human Research
Protections Office (AHRPO) IRB concurrence, the prospective participants were provided a research email invitation to participate with the following enclosures: Request to Participate in Prospecting Best Practices, Written Informed Consent Request, Participant’s Bill of Rights and the Participant Demographic Questionnaire.

Prior to any actual collection of data or research related to this study, the following objectives were met: (a) Received Army Sponsorship of a Colonel (an 0-6) or above stating how the research is mission critical; will be worth the time Soldiers spend participating in the study and agreed to share responsibility for the research meeting all requirements: (a) Brandman University IRB approval (Appendix B) and Brandman University Modification request approval (Appendix C) for exempted research, and (c) Army Human Research Protections Office (AHRPO; Appendix D) research protections administrative review (RPAR) approval that the research protocol is in compliance with the (DoD) supporting research involving human subjects, as defined at U.S. Department of Defense Instruction, (DoDI 3216.02, 2011). The Department of Defense (DoD) requires that information collections (such as surveys, focus groups, and interviews) administered within or across Office of the Secretary of Defense (OSD) or DoD components be licensed and comply with multiple policies (DoDI 1100.13, 2015; DoDI 3216.02, 2011; DoDI 8910.01, 2014).

Day and Bobeva, (2005) conducted an extensive literature review and found that Delphi instrumentation can be conducted in two to ten rounds. Turoff, (1970) explains how most Policy Delphi’s are conducted in a three or four round sequence. According to Turoff, (1970), a three-round Delphi has the most research payoff. In line with
successful Delphi methodology, the three-round sequential process of instrumentation is used in this study (Day & Bobeva, 2005).

The process of creating an interview schedule is aided greatly by a literature review of successful Delphi research. Hsu and Sandford, (2007) explained how past Delphi research takes time. Previous successful Delphi studies took up to two weeks for each round of the Delphi, requiring 45 total days for completion. This study replicated other Delphi studies and utilized a week per round format. For example, the first round is sent to the expert panel, and then the expert panel has that week to respond. The researcher subsequently has a weekend to analyze the data and create the next round’s instrumentation. After three rounds, three weeks would have elapsed, allowing enough time for the prospecting best practice results to be compiled, summarized, validated and pilot tested. To increase participation of each round of the research a reminder email was sent within 24 hours of the beginning of the round and a final email reminder was sent 24 hours before the end of the round to encourage completion of each round.

A Delphi research literature review has emphasized three key stages to Delphi research (Day & Bobeva, 2005). Data collection is conducted in all stages. The first stage of data collection in a Policy Delphi is identified as “Exploration,” and it is comprised of planning the Delphi, selection of the participants, and a pilot study (Day & Bobeva, 2005; Linstone, & Turoff, 2002). During this phase, an abstract explaining the research, purpose, and methodology was presented to the Fresno Recruiting Battalion Commanding Officer (a Lieutenant Colonel-O5) and to the Brigade Commanding Officer (a Colonel-O6). Permission was asked for and sponsorship was obtained from the Fresno Army Recruiting Battalion Commanding Officer and the Brigade Commanding Officer to
contact expert recruiting NCOs within his Battalion. A letter of invitation requested volunteers to participate in prospecting best practice research and was sent to the target population. An email requesting expert volunteers was sent to the population for prospecting best practices (Appendix F). The informed consent form (Appendix G) was sent to the volunteer respondents willing to participate in the best practice research. They also received the research Participant’s Bill of Rights (Appendix H) explaining their research rights and the demographic survey validating their expert qualifications. After each pilot test is conducted and the feedback is noted, voted on by the DMT, and implemented, each round is emailed with a max.gov link to the expert panel member.

The second stage of data collection is the “Distillation” phase, conducted in three rounds. Between each round, the DMT had to decide and design the next subsequent round as previously explained using operationalized guiding questions. Planning the Delphi involved “transposing the framework into a set of questions, formation of the set of criteria for participant’s selection, and preparing the set of questionnaires and supporting documents” (Day & Bobeva, 2005, p. 107). Prospecting terms were operationalized in order to understand a complex human relationship by segmenting them into study able segments.

The third phase is the “Utilization” analysis of the results phase and will be discussed in detail in Chapter V (Day & Bobeva, 2005; Okoli & Pawlowski, 2003). All instruments were peer-reviewed by the Design-Monitor Team for each of the three rounds. At three points during the research process the researcher and DMT will scrub for confidentiality: data collection, data cleaning, and dissemination of research results in order to ensure the results cannot be associated with an Army recruiter panel member.
Delphi Round I (Discovery) Data Collection

An extensive literature review confirms that having a structured questionnaire of operationalized guiding questions for the first round is common in Policy Delphi research (Cox, 2008; Turoff, 1970; Hsu & Sandford, 2007). Seven relevant and clear guiding questions were developed by the DMT by a formal process of three sources: dialoging with successful recruiters in the field, reviewing the prospecting literature, and consulting with other experts to obtain their insights to guide Round I of this Policy Delphi study.

Expert recruiters who responded positively to participate and met the standards to be an expert panel member for the prospecting best practices research were sent the Demographic survey, and Round I through electronic mail (email). All communications through email is blind copied so that the research panel could remain anonymous and communications would be confidential. All emails that started each round had the following common information: research purpose, reminder of the need of the study, reminder that all answers are anonymous, general Policy Delphi background, definition of terms used within the questionnaire, deadlines to filling out each round, and researcher contact information (Appendix J). Respondents were informed of the potential risks and benefits of participation. Respondents were informed that all questions are voluntary as per DoD guidelines, such that respondents can skip any questions if they want to. No personally identifiable information (PII), (such as, names, Social Security Numbers [SSNs], email addresses, Internet Protocols [IP] addresses, street addresses, telephone numbers) were attached to the answers once they have been received from the respondent. Respondents names were kept confidential, by a unique identifying code: 1, 2, 3, etc.
The data was consolidated, compiled, and the responses of the questionnaires were transcribed to determine if there were any emergent themes, patterns, or similarities within the responses (Day & Bobeva, 2005; Okoli & Pawlowski, 2003; Sandford & Chia-Chien, 2007).

**Delphi Round II (Consensus Building) Data Collection**

Round II instrument results were developed from the first instrument of operationalized guiding questions (Skulmoski et al., 2007). The expert recruiters were sent Round II through email. All communications through email is blind copied so that the research panel could remain anonymous and communications would be confidential. Respondents were informed of the potential risks and benefits of participation. Respondents were informed that participation is voluntary as per DoD guidelines. Respondents names were kept confidential, by a unique identifying code: 1, 2, 3, etc. The Round II instrument (Appendix K) asked the expert panel to rank best practices by the degree of importance and to rate best practices level of confidence in telephone, virtual, and face-to-face prospecting best practices, in order to guide future prospecting for 17-24 year olds. Importance is defined as in Table 8.

**Table 8**

<table>
<thead>
<tr>
<th>Importance (Priority or Relevance) Defined</th>
<th>Very Important</th>
<th>Important</th>
<th>Slightly Important</th>
<th>Least Important</th>
</tr>
</thead>
<tbody>
<tr>
<td>A most relevant point</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>First-order priority</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Has direct bearing on major issue</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Must be resolved, dealt with, or treated</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>A most relevant point</td>
<td>Is relevant to the issue</td>
<td>Insignificantly relevant</td>
<td>Least priority</td>
</tr>
<tr>
<td></td>
<td>First-order priority</td>
<td>Second-order priority</td>
<td>Third-order priority</td>
<td>Least relevance</td>
</tr>
<tr>
<td></td>
<td>Has direct bearing on major issue</td>
<td>Significant impact but not until other items are treated</td>
<td>Has little importance</td>
<td>Least measurable effect</td>
</tr>
<tr>
<td></td>
<td>Must be resolved, dealt with, or treated</td>
<td>Does not have to be fully resolved</td>
<td>Not a determining factor</td>
<td>Could be dropped as an item to consider</td>
</tr>
</tbody>
</table>

*Notes. Table modified from Turoff (1970) General Applications: Policy Delphi, p. 87.*
The collected responses provided via electronic survey were analyzed using frequency and highest percentage. The data was consolidated, compiled, and the responses of the questionnaires were transcribed to determine if there were any emergent themes, patterns, or similarities within the responses (Day & Bobeva, 2005; Okoli & Pawlowski, 2003; Sandford & Chia-Chien, 2007). The collected results as submitted by the respondents were organized numerically on a spreadsheet. The collected rated results of the respondents were formulated in consensus during Round II to construct a final summative operationalized guiding question instrument for use in Round III.

**Delphi Round III (Implementing) Data Collection**

The expert recruiters that volunteered to participate and met the standards to be an expert panel member for the prospecting best practices research were sent Round II through email. All communications through email is blind copied so that the research panel could remain anonymous and communications would be confidential. Respondents were informed of the potential risks and benefits of participation. Respondents were informed that participation is voluntary as per DoD guidelines. Respondents names were kept confidential, by a unique identifying code: 1, 2, 3, etc.

The most important collected consensus responses of Round II were used to create the best practice implementation strategy questions in Round III for telephone, virtual, and face-to-face best practices of 17-24 year olds (Appendix L). Seven questions approved by DMT and licensed by ARI comprised Round III. The data was consolidated, compiled, and the responses of the questionnaires were used to determine if there were any emergent themes, patterns, or similarities within the responses (Day & Bobeva, 2005; Okoli & Pawlowski, 2003; Sandford & Chia-Chien, 2007).
Data Analysis

Delphi Round I (Discovery) Data Analysis

The Data Analysis of the first round of responses were qualitatively coded using NVivo software to discover the best prospecting practices themes in the seven operationalized terms: planning practices, lead sources, initiate rapport, identify goals/needs/interests, eliminate assumptions, engender a commitment, and overcome barriers in 17-24 year old markets. A spreadsheet was created to organize the responses by questions and expert panel members. The top four most-commented on responses in each of the seven operationalized questions were used to generate the quantitative questionnaire for Round II consensus building (Hsu & Sandford, 2007). The DMT, and a peer researcher validated the themes developed for Round II. Tie breakers were broken by majority vote of the DMT.

Delphi Round II (Consensus Building) Data Analysis

In the second round of questioning, the data was quantitatively coded from the responses from the exert panel members response rating of importance in the seven operationalized areas of prospecting: planning practices, lead sources, rapport, goals/needs/interests, assumptions, engendering a commitment, and barriers in 17-24 year olds numerically and by percentage. The data was organized by question and expert panel member’s Likert response rating of very important, important, slightly important and least important. The data analysis discovered the highest rated consensus degree of importance scores of the seven operationalized terms in Round II, identified the most important answers in each of the seven operationalized terms by count and percentage. The open-ended questions for Round III were then developed, DMT validated, pilot
tested, and deployed from the data analysis of Round II’s highest majority consensus. Any tiebreakers were broken by majority consensus DMT vote.

**Delphi Round III (Implementing) Data Analysis**

In the third round of questioning, the responses were qualitatively coded using NVivo software identifying the seven areas of implementation of prospecting best practices: planning practices, lead sources, rapport, goals/needs/interests, assumptions, engendering a commitment, and barriers in the four methods of prospecting: telephone, virtual, face-to-face and referral. A spreadsheet of cumulative result statistics was used for the data-analysis. Each research question was cumulatively grouped together by each expert panel member to identify patterns and themes (Bazanos, 2014). The drafted summaries of findings from Round III were then sent to the DMT so that they could be cross-validated to ensure accuracy and avoid researcher bias (Day & Bobeva, 2005). In addition to the DMT validation a peer researcher coded for inter-coder reliability.

Summary results are described in a pattern based on observable most to least common numeric values. Consensus was targeted in order to identify dominate themes and patterns. Subsequent compilation of the data required all printed instruments and related data to be stored in a locked filing cabinet or password protected files on the researcher’s computer and retained for five years (American Psychological Association [APA], 2010; Custodio, 2014).

The final written report was peer-reviewed and approved by the DMT, as is the interpretation of the meaning of the data. Copies of the results were sent to the panel participants, DMT, Army Public Affairs, and the Sponsor of the research, so that they could be made aware of the results (Saucedo, 2014). The results were then used to look
for common best practices to inductively determine common themes and arguments for use in a larger Army recruiting population.

Limitations

The research designs of this study had several limitations. First, the study was Army best practice centric. The processes and expert panel members where part of the Army culture whom had real experience and history in successful prospecting. Seeking problems was not the focus of this research only best practices. Secondly, half of the research population was extracted from Central California as was the DMT. Perceptions regarding Army service may be skewed in California and not so in other parts of America. The economic, social, and political influences in this part of the nation may not apply to the rest of the nation. Thirdly, the scope of the research will be on Army recruiting looked at through the lens of attracting quality young (17-24 years) individuals to a Military organization (Barber, 1998; Griffin, 1996; Rynes & Barber, 1990). A quality individual is one who meets standards for the job and not necessarily the sole best person for the job standpoint; i.e., meets age, medical, moral, educational, and physical standards (Asch, et. al., 2004; Barber, 1998; Hosek & Mattock, 2003). Fourth, the research will be studied from the Army organizational influence (Covey, 2004; Stahl, 2007) of the individual related to recruitment or job choice and not the broader topic of job search (Barber, 1998). Fifth, the small sample population of 19 expert recruiters may not adequately represent the entire Army recruiter population. Sixth, each round had a new survey instrument designed exclusively for it; therefore, there is no large scale calibration of the instrument other than what was done in the pilot test (Bazanos, 2014). Finally, this research will be further restricted to the recruitment of individuals who are sought outside
the military organization (Barber, 1998). Keeping Soldiers in the Army (retention) or returning veterans (prior service) are examples of populations that are excluded.

**Summary**

Chapter III of this research included a detailed description regarding the methodology used in this Policy Delphi study. The research design focus of this research is on discovering an unknown best practice for future development of best practice theory and or policy through the use of structured interviews and analysis (Peirce, et al., 2012). This research implemented continuous research analysis and provided peer feedback from each of the three rounds to create the next subsequent round. Discovering best practices in prospecting is a real world issue. Best practice recruiting studies by Creswell, (2014); Waddell and Ukpokodu, (2012); and Whetstone et al., (2006) assert that a qualitative research approach is needed to explore and identify a gap in knowledge for an individual or a group in order to understand a social or individual problem.

Chapter IV will provide the research approach details and all of the data collection and findings from each step of this research. Chapter V explains the research summary, findings, conclusions, surprises, and recommendations.
CHAPTER IV: RESEARCH, DATA COLLECTION, AND FINDINGS

In this chapter you will be provided with the research approach details and all of the data collection facts and findings from each step of this research. This Policy Delphi research identifies and describes the beginning aspect of Army recruiting-prospecting. Prospecting is a crucial part of recruiting, necessary for accomplishing the recruiting mission (United Stated Army Recruiting Command; USAREC, 2014b). Army recruiters are mandated to prospect; however, there are no formal best practices and many of the recruiting practices have remained unchanged (Barber, 1998; Citarelli, 2006; Johnson, 2014; Matyszak, 2009, Trost, 2014). In order for recruiting in industry, education, and the all-volunteer military (AVM) to continue being successful, innovative recruiting processes must be utilized (Batschelet et al., 2014 February; Trost, 2014; USAREC, 2015; Wyatt et al., 2010; Zangilin, 2011).

Part I: Overview

Chapter IV includes a detailed report of the findings of the research study presented by research questions and a synthesis summary. This chapter is organized by reporting the main research findings, including the presentation of relevant quantitative and qualitative Policy Delphi data and Army prospecting artifacts. The data collection was extracted from an expert panel of 19 California Army recruiters. The expert panel identified themes and patterns of best practices by exploring seven operationalized prospecting terms: (a) planning practices, (b) lead sources, (c) rapport, (d) identify goals/needs/interests, (e) assumptions, (f) engendering a commitment, (g) eliminate barriers in order to determine what best prospecting practices produce results and reduce failure. This chapter is organized in three logical parts from the problem, research
questions, and design: part I presents an introduction, overview, purpose, and research questions, part II is the description of the sample, methodology, and population/sample, and part III is the presentation of the data. Noted conclusions are detailed in Chapter V.

**Purpose Statement**

The purpose of this Delphi study was to discover what the best practices are for implementing telephone, virtual, face-to-face, and referral prospecting, as identified by an expert panel of Army Recruiters when targeting 17-24 year olds.

**Research Questions**

Research questions are questions used to guide and focus elicit information to obtain data (Roberts, 2010). The following questions were used to guide this study.

**Delphi Round I (Discovery)**

What are the prospecting best practices, as described by an expert panel Army Recruiters when targeting 17-24 year olds?

**Delphi Round II (Consensus Building)**

1. What are the most important planning best practices, identified in Round I when targeting 17-24 year old markets, as rated by an expert panel of Army Recruiters.
2. What are the most important lead sources best practices, identified in Round I when targeting 17-24 year old markets, as rated by an expert panel of Army Recruiters.
3. What are the most important rapport building best practices, identified in Round I when targeting 17-24 year old markets, as rated by an expert panel of Army Recruiters.
4. What are the most important goals/needs/interests best practices, identified in Round I when targeting 17-24 year old markets, as rated by an expert panel of Army
Recruiters.

5. What are the most important overcoming assumptions best practices, identified in Round I when targeting 17-24 year old markets, as rated by an expert panel of Army Recruiters.

6. What are the most important engendering a commitment best practices, identified in Round I when targeting 17-24 year old markets, as rated by an expert panel of Army Recruiters.

7. What are the most important overcoming barriers best practices, identified in Round I when targeting 17-24 year old markets, as rated by an expert panel of Army Recruiters.

**Delphi Round III (Implementing)**

1. How would the expert panel implement the identified telephone prospecting best practices, as most important in Round II, when targeting 17-24 year olds?

2. How would the expert panel implement the identified virtual prospecting best practices, as most important in Round II, when targeting 17-24 year olds?

3. How would the expert panel implement the identified face-to-face prospecting best practices, as most important in Round II, when targeting 17-24 year olds?

4. How would the expert panel implement the identified referral prospecting best practices, as most important in Round II, when targeting 17-24 year olds?
Part II: Methodology/Population/Sample

Methodology

The Policy Dephi was selected for its ability to rigorously explore a complex human relationship that little is known about in a geographically dispersed population with little cost or inconvenience (Skulmoski, et. al., 2007; Stitt-Gohdes & Crews, 2004). Using descriptive non-experimental research design in a Policy Delphi, the expert panel focused on describing best practices for telephone, virtual, face-to-face, and referral prospecting when marketing 17-24 year olds.

Data Collection Procedures

The expert panel explored a multifaceted communication process through max.gov survey instruments and had the opportunity for group communication, feedback, and further exploration in an anonymous format (Linstone & Turoff, 2002; Okoli & Pawlowski, 2003; Stitt-Gohdes & Crews 2004). Max survey is based on a “best-of-breed” open source survey tool called LimeSurvey (“Max Survey,” 2015, Help). Three sequential rounds of mixed method survey instruments were conducted remotely using computerized media then transcribed and coded for emergent themes. Respondent’s names were kept confidential, by a unique identifying code. A Design Monitor Team of three experts validated themes, checked the data for accuracy, and designed operationalized prospecting terms. A local recruiter pilot tested the instruments. The Policy Delphi surveys took place January 2016.

Weekly cycles of survey requests, analysis, development, validation, and testing were used in this Policy Delphi to gather the qualitative and quantitative data. At the beginning of each week an electronic survey link (Max.gov) was sent to the expert Army
recruiters via email. The link connected the expert panel member to the surveys that produced data, automatically collected by max.gov. On the last day of each survey week, for three consecutive weeks, the data was collected and organized as a summative data report from max.gov. The qualitative data collected from the max.gov rounds were then coded for emergent themes in NVivo. “NVivo is software that supports qualitative and mixed methods research. It’s designed to help…organize, analyze and find insights in unstructured, or qualitative data like: interviews, open-ended survey responses, articles, social media and web content” (http://www.qsrinternational.com/what-is-nvivo, 2016, that’s where).

A preliminary round collected demographic data through the use of multiple-choice and true/false questioning in order to validate the expertise of the panel. Two rounds (Round I, III) used qualitative survey methods, and a single round (Round II) utilized quantitative deduction procedures to rate previously collect data. Round II used a Likert scale that organized the results by consensual validation of the degree of importance. Likert scales “are the most widely used attitude scale types in the social sciences” (Vogt, 2005, p.174). Consensual validation is defined as “the use of agreement (consensus) of two or more experts to determine whether a statement is true or valid” (Vogt, 2005, p. 57). A majority consensus is having agreement of 50% or greater. For the purpose of this research, having less than 50% is defined as minority consensus.

**Design-Monitor Team Reliability and Validity**

To ensure validity and reliability for the instruments used in this study and their field summary survey results, a Design-Monitor Team (DMT) was utilized. The DMT assisted in reducing researcher bias by ensuring the instruments were accurately
designed, monitored, and measured for what they were intended (Turoff, 1970). The DMT shared the same criteria selection traits as the purposeful population of expert recruiters. Three experts volunteered to be the DMT and signed the release forms, participated in designing reliability and validity monitoring of the best practice research, and participated throughout the research process.

The specific DMT objectives described in Chapter III were met to pretest the research questions, ensuring validated clarity and understanding, avoiding compound questions, recommending alternatives to compound questions, and designing sample responses that are short, specific, and singular in nature. The DMT designed research questions with a formal process utilizing the following three sources:

1. Dialoguing with colleagues (pilot testing).
2. Reviewing the prospecting doctrine/literature.

The DMT looked critically at all the instruments before and after each round while field summary survey results verified and validated responses in order to design the next set of questions for the subsequent rounds. In case of disagreements, the DMT experts voted with majority ruling.

**Inter-coder Reliability**

In addition to the DMT reliability, this best practice research used another peer-researcher to check the coding and interpretation of the field summary survey results to ensure accuracy of themes from the coding. While using the coding software NVivo, inter-coder reliability was accomplished by having the primary researcher code the data and then have the peer-researcher double-code one of the seven (14.28%) survey
questions for Rounds I and III. The results of the peer-researcher reliability coding alignment were 86.8% in agreement with the primary researcher’s coded data for Round I and 92.0% in agreement with the primary researcher’s coded data for Round III. Both rounds of inter-coder reliability met the standards of being above 70% for exploratory research.

**Population**

The total Army recruiter population in the United States is 7,632 (USAREC, 2013). These Army recruiters are assigned to more than 1,400 recruiting stations across America and overseas (USAREC, 2013). The number of possible respondents in California was identified by generating a list of Army recruiters from “http://www.goarmy.com/locate-a-recruiter.html” website, which provides contact information for all Army recruiting offices by zip code. The target population for this research is Army Recruiters whom have the force sustainment 79R military operational specialty (MOS). There are 87 force sustainment 79R MOS Army recruiters in Central California that meet the initial target population requirement. Of the 87 force sustainment 79R MOSs, there are 42 force sustainment 79R MOSs tentatively eligible to participate in the sample population who possess the remaining expert criteria.

**Sample**

This Policy Delphi research study used a purposive sampling composed of subjects that were selected based on their ability as experts in the field of Army recruiting. A panel of 19 expert Army recruiters were selected from a sample pool of 42 Army recruiters whom all had similar homogenous expert criteria selection standards described as (a) over five years’ experience as an Army recruiter; (b) in a position of
influence; (c) a senior NCO, (d) graduated from advanced recruiter school; and (e) have the force sustainment 79R MOS. Nine of the sample population and the three DMT members volunteered from Central California, which is comprised of 55,355 square miles from Oxnard to San Francisco. The remaining 10 experts were referred from the DMT and are honorably discharged retirees who volunteered from across the nation whom also met all the expert selection criteria.

**Part III: Presentation and Analysis of the Data**

The Policy Delphi findings presented in this section include the demographic, qualitative, and quantitative Rounds I-II-III. This section presents each of the study’s research questions in each of the three rounds connecting them to the purpose statement. All the findings, qualitative narrative examples, and quantitative statistical data are reported. The inconsistent, discrepant, or unexpected data is also reported and organized from the three survey rounds and the artifacts of the expert panel of Army recruiters.

Of the 42 potential expert sample population invited to participate as an expert panel member, it was discovered that only 22 met the experience criteria of being an Army recruiter for over five years. The participation and returns of the each round of research are displayed in common numeric values (see Table 9).

**Table 9**

<table>
<thead>
<tr>
<th>Invited</th>
<th>Agreed to Participate</th>
<th>Formally Withdrew</th>
<th>Demo</th>
<th>Round I</th>
<th>Round II</th>
<th>Round III</th>
</tr>
</thead>
<tbody>
<tr>
<td>Expert Panel 42</td>
<td>19</td>
<td>0</td>
<td>19</td>
<td>19</td>
<td>18</td>
<td>13</td>
</tr>
<tr>
<td>Complete:</td>
<td></td>
<td></td>
<td></td>
<td>18</td>
<td>16</td>
<td>9</td>
</tr>
<tr>
<td>Incomplete:</td>
<td>1</td>
<td>1</td>
<td>2</td>
<td>4</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

*Notes. N=19*
Demographic Instrument Data Collection

The expert sample’s demographic analysis was validated from the seven questions asked in the initial demographic survey instrument. The demographic findings affirmed that all 19 panel members possessed the expert criteria of (a) 100% have the force sustainment 79R MOS; (b) have a minimum of at least five years of Army recruiting experience (42.1% 10-15 years exp.); (c) have been in a position of influence (36.8 Operations NCOs); (d) are Army senior enlisted non-commissioned officers (NCO) (68.4% Sergeant First Class rank of E-7); and (e) 100% had completed advanced Army recruiter training (see Table 10). One panel member did not complete the demographic survey.

Table 10

<table>
<thead>
<tr>
<th>Field Summary</th>
<th>Count</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>10&lt;15 years Exp.</td>
<td>8</td>
<td>42.1%</td>
</tr>
<tr>
<td>5&lt;10 years Exp.</td>
<td>6</td>
<td>31.5%</td>
</tr>
<tr>
<td>&gt;15 years Exp.</td>
<td>5</td>
<td>26.3%</td>
</tr>
<tr>
<td><strong>Position of influence: Operations NCO</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Position of influence: Center Leader</td>
<td>7</td>
<td><strong>36.8%</strong></td>
</tr>
<tr>
<td>Position of influence: First Sergeant (1SG)</td>
<td>3</td>
<td>15.7%</td>
</tr>
<tr>
<td>Position of influence: MEPS Guidance Counselor</td>
<td>2</td>
<td>10.5%</td>
</tr>
<tr>
<td>Position of influence: Battalion Master Trainer</td>
<td>1</td>
<td>5.2%</td>
</tr>
<tr>
<td><strong>Sergeant First Class (SFC)</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>First Sergeant (1SG)</td>
<td>3</td>
<td>15.7%</td>
</tr>
<tr>
<td>Master Sergeant (MSG)</td>
<td>2</td>
<td>10.5%</td>
</tr>
<tr>
<td>Command Sergeant Major (CSM)</td>
<td>1</td>
<td>5.2%</td>
</tr>
</tbody>
</table>

Notes. N=19. Force sustainment 79R MOSs and advanced recruiter training 100%.

Additionally, the demographic data indicated that the sample is predominately male (88.8%), older than 46 years old (33.3%), and they had completed some college. The demographic results are displayed in a pattern based on observed most to least common numeric values (see Table 11).
Table 11

**Descriptive Demographic Statistics of Expert Panel**

<table>
<thead>
<tr>
<th>Field Summary</th>
<th>Count</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Male</strong></td>
<td>16</td>
<td>88.8%</td>
</tr>
<tr>
<td>Female</td>
<td>2</td>
<td>11.1%</td>
</tr>
<tr>
<td><strong>46 or older</strong></td>
<td>6</td>
<td>33.3%</td>
</tr>
<tr>
<td>41-45</td>
<td>5</td>
<td>27.8%</td>
</tr>
<tr>
<td>34-40</td>
<td>4</td>
<td>22.2%</td>
</tr>
<tr>
<td>29-33</td>
<td>3</td>
<td>16.6%</td>
</tr>
<tr>
<td><strong>Some College</strong></td>
<td>7</td>
<td>38.8%</td>
</tr>
<tr>
<td>AA</td>
<td>4</td>
<td>22.2%</td>
</tr>
<tr>
<td>BA</td>
<td>4</td>
<td>22.2%</td>
</tr>
<tr>
<td>Graduate or above</td>
<td>2</td>
<td>11.1%</td>
</tr>
<tr>
<td>diploma</td>
<td>1</td>
<td>5.5%</td>
</tr>
</tbody>
</table>

*Notes: N=19. One panel member did not finish the survey.*

**Delphi Round I (Discovery) Data Collection**

In order to generate discovery discussion with the expert panel members, seven areas of prospecting were operationalized by the Design-Monitor team to begin the process of identifying and describing prospecting best practices. The seven operationalized terms are: (a) planning practices; (b) lead sources; (c) establishing rapport; (d) identifying goals/needs/interests; (e) eliminating assumptions, (f) engendering a commitment; and (g) eliminating barriers. The seven operationalized terms were defined in the first round of questioning and remained constant through all three rounds. The expert panel was asked in Round I with seven open-ended structured statements to identify and describe (discovery) best practices when targeting 17-24 year old markets. The responses were cataloged, consolidated, and themes were noted. This raw response data of Round I was built into a cumulative statistics spreadsheet. The top four most commented on responses were used to generate the questionnaire for Round II. Ties were broken by the DMT consensus voting. The DMT approved the questionnaire and it was pilot tested at a local recruiting office before distribution.
Round I: Planning Research Question (RQ) 1. The first question in Round I was, “Planning practices are prospecting systems that are developed with the intent to support, assist, grow, and promote prospecting (i.e., Mission Accomplishment Plan (MAP), Recruiting Operation Planning (ROP), Backwards Planning, Synchronization, etc.). Explain best practices regarding prospecting planning when targeting 17-24 year old markets.” 18 out of 19 expert panel members responded with some descriptive narrative regarding prospecting planning practices. The data was coded by topic frequency so that if the expert panel answered with compound statements, each code was counted. For example, “Prospecting cannot be accomplished without proper planning.” Themes were extracted and thematically described in Table 12.

Table 12

<table>
<thead>
<tr>
<th>Planning:</th>
<th>Frequency of coded responses.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Utilize the Recruiting Operation Planning (ROP).</td>
<td>14</td>
</tr>
<tr>
<td>Thoughtful propensity analysis of recruiting area.</td>
<td>9</td>
</tr>
<tr>
<td>Use of Army product knowledge to fill a need.</td>
<td>6</td>
</tr>
<tr>
<td>Identify target market’s decision influencers.</td>
<td>4</td>
</tr>
<tr>
<td>Have good time management skills</td>
<td>2</td>
</tr>
<tr>
<td>Social media</td>
<td>1</td>
</tr>
<tr>
<td>Being able to prioritize what has a bigger return of investment</td>
<td>1</td>
</tr>
<tr>
<td>Take college classes while on active duty.</td>
<td>1</td>
</tr>
<tr>
<td>Have high school and graduate lead lists.</td>
<td>1</td>
</tr>
</tbody>
</table>


Round I: Lead Sources RQ 2. The second question in Round I was, “Lead sources acquire principal contact resources that allow recruiters to have contact with prospects (i.e., high school contact lists, college contact lists, marketing leads list, future soldier generated contact lists, etc.). Explain best practices in lead sources for prospecting when targeting 17-24 year old markets.” 17 out of 19 expert panel members
responded with some descriptive narrative regarding prospecting lead sources. The responses were then coded and organized into themes. The highest frequency of coded responses identified lead sources generated from secondary schools (high schools) and post-secondary schools (colleges). For example, “High school and Grad Lead Refinement Lists. Being out in the High Schools and Colleges, everyday, making contacts.” Themes were extracted and thematically described in Table 13.

Table 13

<table>
<thead>
<tr>
<th>Lead sources:</th>
<th>Frequency of coded responses.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lead sources generated from secondary schools (high schools) and post-</td>
<td>15</td>
</tr>
<tr>
<td>secondary schools (colleges).</td>
<td></td>
</tr>
<tr>
<td>Lead sources generated by target market peers (future soldiers, other</td>
<td>9</td>
</tr>
<tr>
<td>interested but not qualified).</td>
<td></td>
</tr>
<tr>
<td>Self-generated lead generating activities (i.e., classroom presentations,</td>
<td>7</td>
</tr>
<tr>
<td>college/career fairs).</td>
<td></td>
</tr>
<tr>
<td>Telephone is the best lead source</td>
<td>2</td>
</tr>
<tr>
<td>Lead sources generated from influencers.</td>
<td>2</td>
</tr>
<tr>
<td>Rapport and relationships</td>
<td>1</td>
</tr>
<tr>
<td>Local unemployment offices</td>
<td>1</td>
</tr>
<tr>
<td>School year book is the best lead source</td>
<td>1</td>
</tr>
<tr>
<td>Face-to-face is the best in urban areas</td>
<td>1</td>
</tr>
</tbody>
</table>

*Notes. N=19*

**Round I: Rapport RQ 3.** The third question in Round I was, “Rapport is a mutual understanding, trust, and agreement between you and the prospect (i.e., asking questions, use of humor, agreeing on common interests, listening, etc.). Explain the best practices for initiating rapport in prospecting when targeting 17-24 year old markets.” 16 out of 19 expert panel members responded with some descriptive narrative regarding prospecting initiating rapport. The responses were then coded and organized into themes. The highest coded theme was about establishing empathy by a shared experience. For
example, “Building rapport is simple, find Common Ground and listen.” Themes were extracted and thematically described in Table 14.

Table 14

**RI-RQ3: Initiate Rapport in Prospecting: 17-24yr olds.**

<table>
<thead>
<tr>
<th>Rapport:</th>
<th>Frequency of coded responses.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Establish empathy by shared experiences.</td>
<td>10</td>
</tr>
<tr>
<td>Create credibility by projecting a professional image.</td>
<td>6</td>
</tr>
<tr>
<td>Actively listen.</td>
<td>6</td>
</tr>
<tr>
<td>Ask open-ended fact-finding questions.</td>
<td>3</td>
</tr>
<tr>
<td>Use laughter to break the ice</td>
<td>2</td>
</tr>
<tr>
<td>Prove what you say is true.</td>
<td>2</td>
</tr>
<tr>
<td>Apprehend the interests of the market.</td>
<td>1</td>
</tr>
<tr>
<td>Communicate shared interests.</td>
<td>1</td>
</tr>
<tr>
<td>Compliment them.</td>
<td>1</td>
</tr>
</tbody>
</table>

*Notes. N=19*

**Round I: Goals/Needs/Interests RQ 4.** The fourth question in Round I was, “Identifying goals/needs/interests is information gathering done in order to discuss the prospect’s essential objectives (i.e., active listening, open ended questions, scripts, etc.). Explain the best practices that identify goals/needs/interests in prospecting when targeting 17-24 year old markets.” 14 out of 19 expert panel members responded with some descriptive narrative regarding prospecting practices that identify goals/needs/interests. The responses were then coded and organized into themes. The highest coded theme was the ability to use open-ended, fact-finding questions. For example, “Ask open ended fact-finding questions” and “we need to work on our conversation skills, which involves listening, gathering information, make the conversation ongoing and having a genuine interest in EVERYONE we speak with.” Themes were extracted and thematically described in Table 15.
**Table 15**

**RI-RQ4: Identify Goals/Needs/Interests in Prospecting Practices: 17-24yr olds.**

<table>
<thead>
<tr>
<th>Goals/needs/interests:</th>
<th>Frequency of coded responses.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Use open-ended fact-finding questions.</td>
<td>12</td>
</tr>
<tr>
<td>Actively listen.</td>
<td>7</td>
</tr>
<tr>
<td>Project a better future.</td>
<td>6</td>
</tr>
<tr>
<td>Demonstrate how Army product knowledge can help the prospect.</td>
<td>2</td>
</tr>
<tr>
<td>Plan of what you are going to say by thoughtful propensity research.</td>
<td>1</td>
</tr>
<tr>
<td>Blueprint to keep track of trends/goals/interests</td>
<td>1</td>
</tr>
<tr>
<td>Know what this generation identifies with.</td>
<td>1</td>
</tr>
</tbody>
</table>

*Notes.* N=19

**Round 1: Assumptions RQ 5.** The fifth question in Round I was, “Assumptions are beliefs or statements that are assumed to be true or from which a conclusion can be drawn (i.e., seek to understand, ask follow on questions, restate the answer, etc.). Explain the best practices that eliminate assumptions in prospecting when targeting 17-24 year old markets.” 16 out of 19 expert panel members responded with some descriptive narrative regarding prospecting practices that eliminate assumptions. The responses were then coded and organized into themes. The highest coded theme was the ability to share a common experience with what the prospect. For example, “If you ask the Applicant ‘why’ three times about their answer to what they are interested in, you will get enough information to get an agreement.” Themes were extracted and thematically described in Table 16.

**Table 16**

**RI-RQ5: Eliminate Assumptions in Prospecting Practices: 17-24yr olds.**

<table>
<thead>
<tr>
<th>Eliminating assumptions:</th>
<th>Frequency of coded responses.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Share a common experience with what the prospect has said.</td>
<td>8</td>
</tr>
<tr>
<td>Restate what the prospect has said.</td>
<td>7</td>
</tr>
<tr>
<td>Use open-ended fact-finding questions.</td>
<td>4</td>
</tr>
<tr>
<td>Communicate the benefits that can help your prospect.</td>
<td>3</td>
</tr>
<tr>
<td>Communicate current improvements that have changed.</td>
<td>2</td>
</tr>
<tr>
<td>Use facts to eliminate assumptions.</td>
<td>2</td>
</tr>
</tbody>
</table>
Be open-minded.  1
Use situational scenarios.  1

Notes. N=19

Round I: Engendering a Commitment RQ 6. The sixth question in Round I was, “Engendering a commitment produces obligation (i.e., identify goals and passions, asking for an appointment, etc.). Rank the most important engendering commitment prospecting practices that were identified in Round I when targeting 17-24 year old markets.” 15 out of 19 expert panel members responded with some descriptive narrative regarding prospecting practices that engender a commitment. The responses were then coded and organized into themes. The highest coded theme was selecting a method of closing (e.g., single-choice, two-choice, already enlisted, challenge, weighted). For example, “I was taught very early in my recruiting career, to ‘Ask the Damn Question.’ If you don’t ask the applicant to join the Army, then he/she’s not going to.” Themes were extracted and thematically described in Table 17.

Table 17


<table>
<thead>
<tr>
<th>Engendering a commitment:</th>
<th>Frequency of coded responses.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Select a method of closing (e.g., single-choice, two-choice, already enlisted, challenge, weighted).</td>
<td>10</td>
</tr>
<tr>
<td>Provide an overview of the points discussed.</td>
<td>8</td>
</tr>
<tr>
<td>Close for commitment to an appointment at the end of each stage of conversation.</td>
<td>7</td>
</tr>
<tr>
<td>Get and maintain rapport.</td>
<td>5</td>
</tr>
<tr>
<td>Establish trust and credibility. Be honest.</td>
<td>3</td>
</tr>
<tr>
<td>Plan by blue printing the conversations you are going to have.</td>
<td>2</td>
</tr>
<tr>
<td>Understand what the applicant wants by providing a desirable outcome.</td>
<td>2</td>
</tr>
<tr>
<td>Be direct, don’t be vague about the questions you ask.</td>
<td>1</td>
</tr>
<tr>
<td>Ask for commitment when you first meet someone.</td>
<td>1</td>
</tr>
</tbody>
</table>

Notes. N=19
Round I: Barriers RQ 7. The seventh question in Round I was, “Barriers are obstacles, inefficiencies, or waste that prevents prospecting (i.e., poor training, no planning, no accountability, etc.). Explain the best practices that overcome barriers when targeting 17-24 year old markets.” 16 out of 19 expert panel members responded with some descriptive narrative regarding prospecting practices that overcome barriers. The responses were then coded and organized into themes. The highest coded theme was to understand, implement, and act on the recruiting operation plan (ROP). For example, “Failing to plan will destroy any and all prospecting efforts.” Themes were extracted and thematically described in Table 18.

Table 18


<table>
<thead>
<tr>
<th>Overcoming barriers:</th>
<th>Frequency of coded responses.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Understand, implement, and act on the recruiting operation plan (ROP).</td>
<td>6</td>
</tr>
<tr>
<td>Improve internal team accountability.</td>
<td>5</td>
</tr>
<tr>
<td>Understand selecting methods (i.e., Obviously, re-stating or just supposed (ORJ), feel, felt, found methods).</td>
<td>5</td>
</tr>
<tr>
<td>Increase training in Army product knowledge.</td>
<td>4</td>
</tr>
<tr>
<td>Have a realistic plan and stick with it.</td>
<td>4</td>
</tr>
<tr>
<td>Facts are the only thing that can defeat an obstacle or breach a barrier.</td>
<td>1</td>
</tr>
<tr>
<td>Uncover the real objection.</td>
<td>1</td>
</tr>
<tr>
<td>Hold recruiters accountable.</td>
<td>1</td>
</tr>
<tr>
<td>Time management.</td>
<td>1</td>
</tr>
<tr>
<td>Understand your demographics.</td>
<td>1</td>
</tr>
<tr>
<td>Monitor deficiencies and conduct training.</td>
<td>1</td>
</tr>
</tbody>
</table>

Notes. N=19

Delphi Round II (Consensus Building) Data Collection

In the second round of three consecutive rounds of questioning, the qualitative data results from Round I were used as a foundation for developing a quantitative Round II instrument for consensus-building of best practices (Hsu & Sandford, 2007). 18 of the 19 expert panel members responded to this survey. 17 experts completed all questions in
the survey. The expert panel rated the degree of importance with a Likert scale of the results of Round I, in the seven operationalized areas of prospecting: planning practices, lead sources, rapport, goals/needs/interests, assumptions, engender a commitment, for 17-24 year old markets. The degree of importance is defined, as is each prospecting term in Round II. In case of a tie the DMT would vote and consensus of two out of three would break the tie.

**Round II: Planning RQ 1.** The first question in Round II was, “Planning practices are prospecting systems that are developed with the intent to support, assist, grow, and promote prospecting (i.e., Mission Accomplishment Plan (MAP), Recruiting Operation Planning (ROP), Backwards Planning, Synchronization, etc.). Rate the most important planning prospecting best practices that were identified in Round I when targeting 17-24 year old markets.” 18 expert panel members responded to this survey. Based on the results of this study, 44% of respondents claim that understanding product knowledge has the highest consensual validation of planning prospecting best practice options described in Table 19.

**Table 19**

<table>
<thead>
<tr>
<th>Very Important</th>
<th>Count</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Have Army product knowledge.</td>
<td>8</td>
<td>44.4%</td>
</tr>
<tr>
<td>Identify propensity of the recruiting area.</td>
<td>7</td>
<td>38.8%</td>
</tr>
<tr>
<td>Use the Recruiting Operation Planning (ROP).</td>
<td>2</td>
<td>11.1%</td>
</tr>
<tr>
<td>Distinguish your target market’s decision influencers.</td>
<td>1</td>
<td>5.5%</td>
</tr>
</tbody>
</table>

*Notes. N=19.*

**Round II: Lead Sources RQ 2.** The second question in Round II was, “Lead sources acquire principal contact resources that allow recruiters to have contact with prospects (i.e., high school list, college lists, marketing leads list, future soldier
generated, etc.). Rate the most important lead sources for prospecting best practices that were identified in Round I when targeting 17-24 year old markets.” 17 expert panel members responded to this question. Based on the results of this study, 35% of the respondents claim that lead sources generated from secondary schools (high schools) and post-secondary schools (colleges) have the highest consensual validation of lead source prospecting best practice options described (see Table 20).

Table 20

<table>
<thead>
<tr>
<th>Very Important</th>
<th>Count</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lead sources generated from secondary schools (high schools) and post-secondary schools (colleges).</td>
<td>6</td>
<td>35.2%</td>
</tr>
<tr>
<td>Self-generated lead generating activities (i.e., classroom presentations, college/career fairs).</td>
<td>5</td>
<td>29.4%</td>
</tr>
<tr>
<td>Lead sources generated by target market peers (future soldiers, other interested but not qualified).</td>
<td>5</td>
<td>29.4%</td>
</tr>
<tr>
<td>Lead sources generated from influencers.</td>
<td>1</td>
<td>5.8%</td>
</tr>
</tbody>
</table>


**Round II: Rapport RQ 3.** The third question in Round II was, “Rapport is a mutual understanding, trust, and agreement between you and the prospect (i.e., ask questions, use of humor, agree on common interests, listen, etc.). Rate the most important rapport prospecting best practices that were identified in Round I when targeting 17-24 year old markets.” 17 expert panel members responded to this question. Based on the results of this study, 41% of respondents claim that the ability to listen has the highest consensual validation of rapport prospecting best practice options (see Table 21). Broughton (2012) stated, “Listening is selling’s golden rule” (p.185).
Round II: Goals/Needs/Interests RQ 4. The fourth question in Round II was, “Identify goals/needs/interests is information gathering in order to discuss the prospects essential objectives (i.e., active listening, open ended questions, scripts, etc.). Rate the most important goals/needs/interests prospecting best practices that were identified in Round I when targeting 17-24 year old markets.” 17 expert panel members responded to this question. Based on the results of this study 47% of respondents claim that the ability to use open-ended, fact-finding questions has the highest consensual validation of goals/needs/interests prospecting best practice options, as seen in Table 22.

Table 22


<table>
<thead>
<tr>
<th>Very Important</th>
<th>Count</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Use open-ended fact-finding questions.</td>
<td>8</td>
<td>47.0%</td>
</tr>
<tr>
<td>Active listening.</td>
<td>5</td>
<td>29.4%</td>
</tr>
<tr>
<td>Project a better future.</td>
<td>3</td>
<td>17.6%</td>
</tr>
<tr>
<td>Demonstrate how product knowledge can help.</td>
<td>1</td>
<td>5.8%</td>
</tr>
</tbody>
</table>


Round II: Assumptions RQ 5. The fifth question in Round II was, “Assumptions are beliefs or statements that is assumed to be true and from which a conclusion can be drawn (i.e., seek to understand, and follow on questions, restate the answer, etc.). Rate the most important overcoming assumptions prospecting best
practices that were identified in Round I when targeting 17-24 year old markets.” 16 expert panel members responded to this question. Based on the results of this study, 56% of respondents claim that the ability to communicate those benefits of joining the Army that can help with the prospect’s need has the highest consensual validation of overcoming assumptions prospecting best practice options. It is interesting to note that, “The ability to communicate current improvements that have changed” was an initial source code provided in Round I, yet it received zero votes in Round II (see Table 23).

Table 23

<table>
<thead>
<tr>
<th>RII-RQ5: Rated Importance in Overcoming Assumptions: 17-24yr olds.</th>
<th>Count</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Communicate the benefits that can help with your prospect’s need.</td>
<td>9</td>
<td>56.2%</td>
</tr>
<tr>
<td>Share a common experience with what the prospect has said.</td>
<td>4</td>
<td>25.0%</td>
</tr>
<tr>
<td>Restate what the prospect has said.</td>
<td>3</td>
<td>18.7%</td>
</tr>
<tr>
<td>Communicate current Army enhancements.</td>
<td>0</td>
<td>0.0%</td>
</tr>
</tbody>
</table>


Round II: Engendering a Commitment RQ 6. The sixth question in Round II was, “Engendering a commitment produces obligation (i.e., identify goals and passions, asking for an appointment, etc.). Rate the most important engendering commitment prospecting best practices that were identified in Round I when targeting 17-24 year old markets.” 16 expert panel members responded to this question. Based on the results of this study, 43% of respondents claim that selecting a method of closing (e.g., single-choice, two-choice, already enlisted, challenge, weighted) has the highest consensual validation of engendering a commitment in prospecting best practice options. Further explained, expert recruiters concluded that in order to engender a commitment, recruiters
have to be able to select a method of closing appropriate for the sales relationship as described in Table 24.

Table 24

**RII-RQ6: Rated Importance in Engendering a Commitment: 17-24yr olds.**

<table>
<thead>
<tr>
<th>Very Important</th>
<th>Count</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Select a method of closing (e.g., single-choice, two-choice, already enlisted, challenge, weighted).</td>
<td>7</td>
<td>46.6%</td>
</tr>
<tr>
<td>Get and maintain rapport.</td>
<td>4</td>
<td>25.0%</td>
</tr>
<tr>
<td>Provide an overview of the points discussed.</td>
<td>3</td>
<td>18.7%</td>
</tr>
<tr>
<td>Close for commitment to an appointment at the end of each stage of conversation.</td>
<td>2</td>
<td>12.5%</td>
</tr>
</tbody>
</table>

*Notes. N=19.*

**Round II: Barriers RQ 7.** The seventh question in Round II was, “Barriers are obstacles, inefficiencies or waste that prevents prospecting (i.e., poor training, no planning, no accountability, etc.). Rate the most important overcoming barriers prospecting best practices that were identified in Round I when targeting 17-24 year old markets.” 16 expert panel members responded to this question. Based on the results of this study, 56% of respondents claim that understanding sales methods (i.e., obviously you, re-stating the concern and just supposed (ORJ); feel, felt, found methods) has the highest consensual validation of overcoming barriers in prospecting best practice options, as described in Table 25.

Table 25

**RII-RQ7: Rated Importance in Overcoming Barriers: 17-24yr olds.**

<table>
<thead>
<tr>
<th>Very Important</th>
<th>Count</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Understand sales methods (i.e., Obviously, re-stating or just supposed (ORJ), feel, felt, found methods).</td>
<td>9</td>
<td>56.2%</td>
</tr>
<tr>
<td>Increase training in Army product knowledge.</td>
<td>4</td>
<td>25.0%</td>
</tr>
</tbody>
</table>
Understand, implement, and act on the recruiting operation plan (ROP).

Improve internal team accountability.


Delphi Round III (Implementing) Data Collection

The third of three consecutive rounds was comprised of seven questions with four sub questions in each question. Round III (Implementing) asked the expert panel to implement the highest importance consensus provided from Round II’s seven operationalized outcomes of best practices into the four methods of prospecting (i.e., telephone, virtual, face-to-face and referral). The open-ended questions were developed, pilot tested, DMT validated, and deployed for Round III via email with a max.gov link. The questions were answered by 13 out of 19 expert panel members. The coded results of the Round III qualitative data are organized into themes or categories using NVivo. The responses were cataloged by coded themes not by expert panel member (i.e., panel members may have been coded multiple times in multiple themes. The raw response data of all rounds was built into a cumulative data summary spreadsheet for use in Chapter V conclusions and implications. Ties were broken by the DMT consensus voting.

Round III: Planning RQ 1. The first requested action in Round III was first defined, “Planning practices are prospecting systems that are developed with the intent to support, assist, grow, and promote prospecting (i.e., Mission Accomplishment Plan (MAP), Recruiting Operation Planning (ROP), Backwards Planning, Synchronization, etc.); Propensity: a strong natural tendency to do something (http://www.merriam-webster.com/dictionary/propensity, 2016).” The requested action item asked was, “Of the identified planning best practices selected as the highest consensus in Round II, explain how to implement propensity into telephone, virtual, face-to-face, and referral
prospecting when targeting 17-24 year olds.” Based on the results of this study, 12 out of 19 expert panel members responded with some descriptive narrative regarding implementing propensity planning into the four modes of prospecting. Although the question was directed at a strategic prospect planning action in the four modes of prospecting, they were returned with a mix of strategic planning responses and recruiter-prospecting activities as identified in table 26. The recruiter-prospecting action activity responses were not the intent of the questioning but they were an outlying outcome. The most frequently coded answer was in the face-to-face prospecting method. Seven coded responses claimed implementing propensity as exampled, “Conduct market analysis in face-to-face prospecting and go to high return areas.” The codes are extracted and thematically described in Table 26.

Table 26

<table>
<thead>
<tr>
<th>RIII-RQ1: Best Practices to Implement Propensity Planning (Based on Responses Provided in Round II): 17-24yr olds.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Propensity planning coding:</td>
</tr>
<tr>
<td>Telephone: Know the market propensity and focus on high return markets.</td>
</tr>
<tr>
<td>Telephone: Understand market patterns of movement in telephone prospecting and adjust your actions to make the highest contact ratio.</td>
</tr>
<tr>
<td>Telephone: Plan to telephone prospect and follow through.</td>
</tr>
<tr>
<td>Telephone: Implement divisions of recruiter labor dividing between telephone and face-to-face prospecting.</td>
</tr>
<tr>
<td>Virtual: Use common military friendly websites to virtual prospect.</td>
</tr>
<tr>
<td>Virtual: Identify one recruiter to virtual prospect.</td>
</tr>
<tr>
<td>Virtual: Commit a small amount of time to virtual prospecting.</td>
</tr>
<tr>
<td>Virtual: Target top producing zip codes.</td>
</tr>
<tr>
<td>Face-to-face: Conduct market analysis in face-to-face prospecting and go to high return areas.</td>
</tr>
<tr>
<td>Face-to-face: Implement a division of recruiter labor.</td>
</tr>
<tr>
<td>Face-to-face: Present yourself as a professional.</td>
</tr>
<tr>
<td>Face-to-face: Have goals.</td>
</tr>
<tr>
<td>Face-to-face: Create competition.</td>
</tr>
<tr>
<td>Referral: Conduct continuous referral prospecting because it is the best method.</td>
</tr>
<tr>
<td>Referral: Devote a small amount of time.</td>
</tr>
<tr>
<td>Referral: Have rapport.</td>
</tr>
</tbody>
</table>
**Round III: Lead Sources RQ 2.** The second requested action in Round III was first defined as, “Lead sources acquire principal contact resources that allow recruiters to have contact with prospects (i.e., high school lists, college lists, marketing leads list, future soldier generated leads, etc.).” The requested action item asked was, “Of the identified lead source best practices selected as the highest consensus provided in Round II, explain how to implement secondary schools (high schools) and post-secondary schools (colleges) lists into telephone, virtual, face-to-face, and referral prospecting when targeting 17-24 year olds.” Based on the results of this study, 10 out of 19 expert panel members responded with some descriptive narrative how to implement secondary schools (high schools) and post-secondary schools (colleges) lists into the four modes of prospecting. The highest frequency of coded data was from the mode of telephone prospecting. Five similarly coded themes regarding planning when implementing lead sources. For example, “Set goals. Goals must be specific, measurable, attainable, realistic, [and] timely (SMART).” The codes are extracted and thematically described in Table 27.

<table>
<thead>
<tr>
<th>Secondary and post-secondary school lead sources coding:</th>
<th>Frequency of responses.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Telephone: Set planning goals (SMART) specific, measurable, attainable, realistic, and timely.</td>
<td>5</td>
</tr>
<tr>
<td>Telephone: Prioritize in high propensity markets.</td>
<td>3</td>
</tr>
<tr>
<td>Telephone: Ask scripted planned questions.</td>
<td>1</td>
</tr>
<tr>
<td>Telephone: Have a good answering machine message.</td>
<td>1</td>
</tr>
<tr>
<td>Telephone: Not effective</td>
<td>1</td>
</tr>
<tr>
<td>Virtual: Not effective</td>
<td>3</td>
</tr>
<tr>
<td>Virtual: Plan and execute</td>
<td>1</td>
</tr>
</tbody>
</table>
Virtual: Utilize targeted email
Virtual: Message organization’s mission, vision, programs, and benefits.
Virtual: Utilize Facebook
Face-to-face: Visit high propensity schools
Face-to-face: Plan to visit schools within high propensity areas
Face-to-face: Have a face-to-face plan to prioritize based on propensity of the market.
Face-to-face: Visit high propensity households.
Face-to-face: Plan by setting contact milestones.
Face-to-face: Use telephone lists as a tool to inform the leads where you will be.
Referral: Plan and execute.
Referral: Secondary and post-secondary school lists are best if a future soldier can scrub them for propensity (prioritizing by an inside source).
Referral: Scrub the list while at the school.
Referral: Ask for a referral at the end of the phone call.
Referral: Best resource because a referral process validates it.

Notes. N=19

**Round III: Rapport RQ 3.** The third requested action in Round III was first defined as, “Rapport is a mutual understanding, trust, and agreement between you and the prospect (i.e., asking questions, use of humor, agreeing on common interests, listening, etc.).” The requested action item asked was, “Of the identified means to establish rapport best practice provided in Round II, describe implementing active listening into telephone, virtual, face-to-face, and referral prospecting when targeting 17-24 year old markets.”

Based on the results of this study, 10 out of 19 expert panel members responded with some descriptive narrative regarding implementing active listening into the four modes of prospecting. Five similarly coded themes regarding telephone prospecting, which requires active listening. For example, “Listening to the responses during a phone call is key to a successful appointment.” The codes are extracted and thematically described in Table 28.
**Table 28**

**R III-RQ3: Best Practices to Implement Active Listening in Rapport (Based on Responses Provided in Round II): 17-24yr olds.**

<table>
<thead>
<tr>
<th>Active listening in rapport coding:</th>
<th>Frequency of responses.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Telephone: Implement active listening strategies.</td>
<td>5</td>
</tr>
<tr>
<td>Telephone: Implement asking open-ended fact-finding questions.</td>
<td>3</td>
</tr>
<tr>
<td>Telephone: Don’t give too much information.</td>
<td>2</td>
</tr>
<tr>
<td>Virtual: Active Listening does not apply.</td>
<td>3</td>
</tr>
<tr>
<td>Virtual: Respond in a timely manner to questions being asked.</td>
<td>3</td>
</tr>
<tr>
<td>Virtual: Send out info that needs to be filled in that asks specific qualification questions.</td>
<td>1</td>
</tr>
<tr>
<td>Virtual: Put visual stimulating objects on social media to stimulate conversations.</td>
<td>1</td>
</tr>
<tr>
<td>Face-to-face: Ask fact-finding questions.</td>
<td>2</td>
</tr>
<tr>
<td>Face-to-face: Have empathy while listening.</td>
<td>1</td>
</tr>
<tr>
<td>Face-to-face: Remember and repeat the person’s name.</td>
<td>1</td>
</tr>
<tr>
<td>Face-to-face: Be genuine.</td>
<td>1</td>
</tr>
<tr>
<td>Face-to-face: Body posture.</td>
<td>1</td>
</tr>
<tr>
<td>Face-to-face: Shake hands and look them in the eye.</td>
<td>1</td>
</tr>
<tr>
<td>Referral: Understand why they are being referred (blueprint information) and provide the service to fill that need.</td>
<td>3</td>
</tr>
<tr>
<td>Referral: Wait for an answer.</td>
<td>2</td>
</tr>
<tr>
<td>Referral: Active listening involves a sense of pride of what you are doing.</td>
<td>1</td>
</tr>
<tr>
<td>Referral: Be thorough-answer all questions</td>
<td>1</td>
</tr>
</tbody>
</table>

*Notes. N=19*

**Round III: Goals/Needs/Interests RQ 4.** The fourth requested action item for the expert panel in Round III was first defined as, “Identifying goals/needs/interests is information gathering done in order to discuss the prospect’s essential objectives (i.e., active listening, open ended questions, scripts, etc.).” The action item requested was, “Of the identified goals/needs/interests best practices provided in Round II, describe implementing open-ended fact-finding questions while telephone, virtual, face-to-face, and referral prospecting when targeting 17-24 year olds.” Based on the results of this study, 10 out of 19 expert panel members responded with some descriptive narrative regarding implementing open-ended fact-finding questions while utilizing the four modes of prospecting. Four similarly coded themes regarding the telephone mode of
prospecting requires market research on what the prospect wants (blueprint information) in order to tailor your fact-finding questions. For example the expert stated, “First do the research on what your target market wants; prepare by scripting the questions.” The codes are extracted and thematically described in Table 29.

Table 29

**RIII-RQ4: Best Practices to Implement Open-Ended Fact-finding Questions that Identify Goals/Needs/Interests (Based on Responses Provided in Round II): 17-24yr olds.**

<table>
<thead>
<tr>
<th>Open-ended fact-finding questioning coding:</th>
<th>Frequency of responses.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Telephone: Market research on what the prospect wants (blueprint information) in order to tailor your fact-finding questions.</td>
<td>4</td>
</tr>
<tr>
<td>Telephone: Train and rehearse ask the fact-finding questions.</td>
<td>2</td>
</tr>
<tr>
<td>Telephone: Listen after you ask the fact-finding questions.</td>
<td>1</td>
</tr>
<tr>
<td>Telephone: Have rapport.</td>
<td>1</td>
</tr>
<tr>
<td>Virtual: Instant message, tweet, and Facebook message questions.</td>
<td>1</td>
</tr>
<tr>
<td>Virtual: Blueprint and provide the information to fill that need.</td>
<td>1</td>
</tr>
<tr>
<td>Virtual: Post videos and ask open-ended fact-finding challenge questions.</td>
<td>1</td>
</tr>
<tr>
<td>Face-to-face: Be a mentor</td>
<td>1</td>
</tr>
<tr>
<td>Face-to-face: Be approachable.</td>
<td>1</td>
</tr>
<tr>
<td>Face-to-face: Be an active listener.</td>
<td>1</td>
</tr>
<tr>
<td>Face-to-face: Be interesting</td>
<td>1</td>
</tr>
<tr>
<td>Face-to-face: Be empathetic</td>
<td>1</td>
</tr>
<tr>
<td>Referral: Ask the person making the referral tell you what the need is of the lead.</td>
<td>2</td>
</tr>
<tr>
<td>Referral: Establish trust.</td>
<td>1</td>
</tr>
<tr>
<td>Referral: Identify need.</td>
<td>1</td>
</tr>
</tbody>
</table>

*Notes. N=19*

**Round III: Assumptions RQ 5.** The fifth action item of the expert panel in Round III was first defined, “Assumptions are beliefs or statements that are assumed to be true and from which a conclusions are drawn (i.e., seek to understand, and follow on questions, restate the answer, etc.).” The requested action item asked was, “Of the identified assumptions best practice provided in Round II, describe implementing the skills of communicating the benefits of joining the Army to satisfy the prospect’s need into telephone virtual, face-to-face, and referral prospecting when targeting 17-24 year olds.” Based on the results of this study, 10 out of 19 expert panel members responded
with some descriptive narrative regarding implementing the benefits of joining the Army to satisfy the prospect’s need. Five similarly coded themes regarding telephone prospecting stated that only a limited amount of information needs to be provided to the prospect. For example the expert stated, “You are not supposed to sell the Army. You are supposed to sell the interest and appointment for a total face-to-face commitment later.” The codes are extracted and thematically described in Table 30.

Table 30

**RIII-RQ5: Best Practices to Implement Satisfying the Prospect’s Need to Overcome Assumptions (Based on Responses Provided in Round II): 17-24yr olds.**

<table>
<thead>
<tr>
<th>Answering the need in overcoming assumptions coding:</th>
<th>Frequency of responses.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Telephone: Don’t oversell, only get the appointment.</td>
<td>5</td>
</tr>
<tr>
<td>Telephone: Generate curiosity</td>
<td>2</td>
</tr>
<tr>
<td>Telephone: After you have identified goals, needs, passions, explain how the Army can help them achieve those things.</td>
<td>2</td>
</tr>
<tr>
<td>Telephone: Understand your product.</td>
<td>1</td>
</tr>
<tr>
<td>Telephone: Ask and listen.</td>
<td>1</td>
</tr>
<tr>
<td>Telephone: Be calm and confident.</td>
<td>1</td>
</tr>
<tr>
<td>Telephone: Paint word pictures.</td>
<td>1</td>
</tr>
<tr>
<td>Virtual: Tailor message posted virtually to answer the need based from market analysis.</td>
<td>2</td>
</tr>
<tr>
<td>Virtual: Include pictures and videos to answer the need in the virtual environment.</td>
<td>2</td>
</tr>
<tr>
<td>Virtual: Describe implementing the skills of communicating the benefits of joining the Army to satisfy the prospect’s need in virtual prospecting.</td>
<td>1</td>
</tr>
<tr>
<td>Virtual: Not a good mode to answer a need.</td>
<td>1</td>
</tr>
<tr>
<td>Face-to-face: Preplan how you would satisfy the prospect’s need.</td>
<td>2</td>
</tr>
<tr>
<td>Face-to-face: Communicate genuinely. Be honest about the benefits of joining the Army to satisfy the prospect’s need.</td>
<td>2</td>
</tr>
<tr>
<td>Face-to-face: Better because you can read the prospects body language and have a better understanding of their need.</td>
<td>1</td>
</tr>
<tr>
<td>Referral: Ask the person providing the lead what the referral’s need is so you can prepare for that conversation.</td>
<td>1</td>
</tr>
<tr>
<td>Referral: Be honest by sharing how your need has been answered.</td>
<td>1</td>
</tr>
<tr>
<td>Referral: Gain interest and give them a reason to come talk to you</td>
<td>1</td>
</tr>
<tr>
<td>Referral: Be genuine by meaning what you say and saying what you mean.</td>
<td>1</td>
</tr>
</tbody>
</table>

*Notes. N=19*

**Round III: Engendering a Commitment RQ 6.** The sixth action item for the expert panel in Round III was first defined, “Engendering a commitment produces
obligation (i.e., identifying goals and passions, asking for an appointment, etc.). Closing is the best practice to engender a commitment (e.g., single-choice, two-choice, already enlisted, challenge, weighted). The requested action item asked was, “Of the identified engendering a commitment best practice provided in Round II, describe the best practice for implementing a method of closing (e.g., single-choice, two-choice, already enlisted, challenge, weighted) into telephone virtual, face-to-face, and referral prospecting when targeting 17-24 year olds.” Based on the results of this study, 10 out of 19 expert panel members responded with some descriptive narrative regarding implementing a method closing is the best practice to engender a commitment. Face-to-face (4 of 10), and referral (4 of 10) methods of prospecting had tied for majority consensus coded similar responses on closing based on the applicant’s need and personality. For example one expert stated, “Here you could use the whole bag of tricks. Hard close, soft close, challenge, patriotism. Just depends on the person on what you feel pushes their brave button.” The codes are extracted and thematically described in Table 31.

Table 31

RIII-RQ6: Best Practices to Implement Closing Techniques to Engender a Commitment (Based on Responses Provided in Round II): 17-24yr olds.

<table>
<thead>
<tr>
<th>Closing best practice to engender a commitment coding:</th>
<th>Frequency of responses.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Telephone: Close based on the applicant’s personality.</td>
<td>3</td>
</tr>
<tr>
<td>Telephone: Pay attention to what the prospects needs are and then select a closing method.</td>
<td>1</td>
</tr>
<tr>
<td>Telephone: Plant the seed of information and schedule the appointment.</td>
<td>1</td>
</tr>
<tr>
<td>Telephone: 2 Choice close it the best.</td>
<td>1</td>
</tr>
<tr>
<td>Telephone: Ask what would it hurt to get some answers about Army benefits?</td>
<td>1</td>
</tr>
<tr>
<td>Virtual: Not a closing option to engender a commitment.</td>
<td>3</td>
</tr>
<tr>
<td>Virtual: Plant the seed of information and schedule the appointment.</td>
<td>1</td>
</tr>
<tr>
<td>Virtual: Instant message the different closing methods until your succeed</td>
<td>2</td>
</tr>
<tr>
<td>Face-to-face: Close based on the applicant’s personality.</td>
<td>4</td>
</tr>
<tr>
<td>Face-to-face: Challenge.</td>
<td>1</td>
</tr>
<tr>
<td>Face-to-face: Two choice close.</td>
<td>1</td>
</tr>
<tr>
<td>Referral: Close based on applicant’s need.</td>
<td>4</td>
</tr>
</tbody>
</table>
Referral: Practice closing.  
Referral: Be skilled in closing so you can flex to what dominant buying motive (DBM) the prospect has.  
Referral: Invite the future soldier to refer and attend an appointment.  
Referral: Be empathetic show how you can help.  

Notes. \( N=19 \)

**Round III: Barriers RQ 7.** The seventh action item for the expert panel in Round III was first defined as, “Barriers are obstacles, inefficiencies, or waste that prevents prospecting (i.e., poor training, no planning, no accountability, etc.). Sales methods are best practices to overcome barriers (i.e. Obviously, Re-stating of Just supposed (ORJ); feel, felt, found methods).” The final requested action item asked was, “Of the identified overcoming barriers best practice identified in Round II, describe implementing sales methods (i.e. Obviously, Re-stating of Just supposed (ORJ), feel, felt, found methods) into telephone virtual, face-to-face, and referral prospecting when targeting 17-24 year olds.” Based on the results of this study, 9 out of 19 expert panel members’ coded responses with some descriptive narrative regarding implementing sales methods best practices to overcome barriers. Four similarly coded themes consider being a professional recruiter the best method to overcome barriers in face-to-face prospecting. Exampled statements are, “Train, train, train. Hands-on training [is needed for] this skill. Do not sound robotic. The recruiter has two to three minutes to make an impression and feel, felt found can sound scripted.” The codes are extracted and thematically described in Table 32.

Table 32

**RIII-RQ7: Best Practices to Implement Sales Methods that Overcome Barriers (Based on Responses Provided in Round II: 17-24yr olds).**

<table>
<thead>
<tr>
<th>Sales methods best practice in overcoming barriers coding:</th>
<th>Frequency of responses.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Telephone: Only providing enough information to obtain the appointment.</td>
<td>3</td>
</tr>
<tr>
<td>Telephone: Tailor your personality to the applicant.</td>
<td>2</td>
</tr>
</tbody>
</table>
Summary of Findings

This three-part chapter summarized the problem, research, data collection, and presented the research findings. Part I presented an introduction, overview, purpose, and the research questions. Part II described the sample, methodology, data collection procedures, DMT reliability and validity, inter-coder reliability, population, and sample. Part III presented the data findings in numeric order in tables for each of the research questions. The data collection methods approved by Brandman University’s Institution Review Board (BUIRB), and the Army Human Resources Protection Office (AHRPO) concurrence as described in Chapter III were subsequently undertaken. The data produced qualitative and quantitative results in the form of three surveys from 19 expert Army recruiter participants. The data was coded and analyzed, which yielded seven operationalized terms and seven emergent best practice themes as very important in prospecting. Major findings and noted conclusions will be detailed in Chapter V.
CHAPTER V: SUMMARY, CONCLUSIONS, IMPLICATIONS, AND RECOMMENDATIONS

“Do nothing out of vain ambition or conceit, but in humility count others more significant than yourselves. Let each of you look not only to his own interests, but also to the interests of others” (Philippians 2:3-4, English Standard Version).

Summary

Chapter I identified the problem, background, significance, and delimitations. Chapter II reviewed the literature. Chapter III prepared the research methodology, sample, instrumentation, pilot testing, design monitor team, data collection, and analysis. Chapter IV presented the research findings. This chapter represents a summary of emergent themes and patterns of Army recruiting prospecting best practices conclusions, implications, and recommendations of Policy Delphi research conducted in January 2016.

According to the literature review, and as reported in Chapter I, the military and its recruiters have essentially focused on the same recruiting practices as those practiced at the inception of the all-volunteer military (AVM; Asch et. al., 2004; Orvis & Asch, 2001). Prospecting is not standardized (Schiffman, 2005). The current recruiting systems are showing signs of stress, and soon they might not be able to recruit the personnel necessary to maintain the AVM of the future (Asch, et al., 2010; Cortez, 2014; Orvis & Asch, 2001; Rostker, et al, 2014). Recruiting success is not automatic and constant adaptation to internal and external pressure is needed. The research findings in literature describe prospecting as a skill that needs constant planning, refinement, and ultimately begins the recruiting process.
This Policy Delphi study gathered prospecting best practice information from 19 expert panel members who all shared expert homogenous traits. The expert panel of Army recruiter leaders participated in a demographic survey and three rounds of operationalized structured questionnaires that were exploratory, anonymous, sequential, and were administered and collected from max.gov. Max.gov is a secure Department of Defense (DoD) approved survey platform. The summarized qualitative result data was organized into categories and then entered into NVivo and subsequently analyzed for emerging patterns. “NVivo is software that supports qualitative and mixed methods research” (http://www.qsrinternational.com/what-is-nvivo, 2016, that’s where). The summarized quantitative data was organized from the outcome of a Likert scale numeric consensus. A Likert scale is “a widely used questionnaire format…[that] tends to have high reliabilities” (Vogt, 2005, pp.174-175). Specific findings and recommendations discussed in this chapter support literature which identifies and describes best practices that can be acted on in order to increase recruiting opportunities.

The purpose of this Delphi study was to discover what the best practices are for implementing telephone, virtual, face-to-face, and referral prospecting, as identified by an expert panel of Army Recruiters when targeting 17-24 year olds. Research questions are questions used to guide and focuses elicit information to obtain data (Roberts, 2010). The following questions were used to guide this study: Round I (Discovery): What are the prospecting best practices, as described by an expert panel of Army Recruiters when targeting 17-24 year olds? Round II (Consensus): What are the most important prospecting best practices in (a) planning; (b) lead sources; (c) establishing rapport; (d) identifying goals/needs/interests; (e) eliminating assumptions; (f) engendering a
commitment; (g) identified in Round I when targeting 17-24 year old markets, as rated by an expert panel of Army Recruiters? Round III (Implementing): How would the expert panel implement the identified telephone, virtual, face-to-face, and referral prospecting best practices, as most important in Round II, when targeting 17-24 year olds?

This study used both qualitative and quantitative research designs in a Policy Delphi Methodology. The Policy Delphi study methodology explored a complex human process in a geographically dispersed population. The total Army recruiter population in the United States is 7,632 (USAREC, 2013). These Army recruiters are assigned to more than 1,400 recruiting stations across America and overseas (USAREC, 2013). This excessively large and spread out population was deemed incompatible for Policy Delphi research. The target population for this research was purposefully selected from the 87 Central California force sustainment-79R military occupational specialty (MOS) Army Recruiters. The purposive sample was composed of subjects deliberately selected by the researcher in order to pinpoint certain characteristics that are representative of a population. The homogeneous Policy Delphi population of experts for this research comes from Army recruiting because of their experience (over five years as Army recruiters) and association with the discipline area (Army recruiting) of the research (Hsu & Safford, 2007). Senior ranking NCO’s (E-7 and above) have been trained in the art of recruiting (advanced Army recruiting training) and are in a position of leadership to understand and identify trends in their areas of influence (USAREC, 2014a). Of the 42 potential expert sample population from Central California invited to participate as an expert panel member, it was discovered that only a sample of 22 met the experience criteria of being an Army recruiter for over five years. Out of that sample population of
22 with over five years’ experience force sustainment 79R MOS Army recruiters, this sample assembled an expert panel population of only nine expert Army recruiters from Central California. The nine experts worked in Fresno Army Recruiting Battalion, which is comprised of 53,525 square miles of Central California from Oxnard to San Francisco.

In order to achieve a wider experience base, 10 retired force sustainment-79R military occupational specialty (MOS) Army recruiters were referred from the DMT and volunteered to participate as expert panel members from the rest of the United States. These 10 experts were honorably discharged retired Army recruiters. A design monitor team (DMT) of three homogenous experts, who met all the same expert selection criteria, also volunteered from Central California. The Demographic survey results confirmed that all 19 experts panel members and the DMT met all expert Army recruiter selection criteria for a purposeful cross-section of expert Army recruiters.

**Major Findings**

The major research findings are organized by Policy Delphi round and research question. The conclusions are derived from the summative data analysis after each round as discussed in detail in Chapter IV. These findings were taken apart, segmented, and themes were identified. The major findings of this study add to the previous limited prospecting understanding for Army recruiting. The majority of literature about prospecting is sales related from a business perspective (Feese, 2000; Krause, 2013; Tracy, 2015). This research adds to the majority of business sales related literature, affirming that the Army recruiting process is also relationship-centric, specifically in prospecting for Army enlistment into an all-volunteer military (AVM). The conclusions
are discussed in this chapter within the framework of previous studies, theory, and the literature base. In addition to the researcher, the DMT scrutinized the findings after each round to ensure validity and reliability, and that the generalizations made were warranted by the findings.

**Delphi Round I (Discovery) Major Findings**

The 19 expert panel members who responded in Round I (max.gov), provided some rich discovery data identifying what prospecting best practices are, when targeting 17-24 year olds. Although all responses were the expert panel’s best practice contribution, only the top four summative major findings from Round I, organized by the seven operationalized terms (a) planning practices; (b) lead sources; (c) establishing rapport; (d) identifying goals/needs/interests; (e) eliminating assumptions; (f) engendering a commitment and (g) eliminating barriers, moved on to Round II.

The cumulative qualitative results of Round I indicate that multiple homogenous best practice coded findings crossed into multiple operationalized areas. Planning to plan, active listening, asking open-ended fact finding questions, closing based on personality, overcoming barriers/obstacles by empathy to solve a need, and product knowledge are common themes that cross into multiple prospecting operationalized terms. Literature supports the best practices discovered in Round I who found mastery of a complex sale requires planning and diagnostics of what problems the customer is experiencing (Thull, 2010; Tracy, 2015). These testimonials are further supported by Tracy (2015) and Pink (2012), where the skill of asking questions can get you better results than telling the prospect the right answers. Further alignment with multiple authors (Broughton, 2012; Schiffman, 2005; Taylor, 2014; Tracy, 2015), explain how to
adapt to the client’s needs by asking questions that gather information about the client. A complete list of all response codes including the outlying codes is provided in Chapter IV.

**Delphi Round II (Consensus Building) Major Findings**

Round II instrument identified the degrees of importance from the top four responses in Round I in order to identify a single consensus best practice in each of the seven operationalized prospecting terms. Eighteen out of 19 expert panel members participated in consensus building by answering a Likert scale of seven operationalized prospecting questions. Based on the summative findings, organized by question, the following two major and five minor consensus quantitative statistical findings of Round II best practices as defined by an expert Army panel are:

1. A 44% (minority consensus) of respondents claim that understanding product knowledge has the highest consensual importance validation for planning prospecting.

2. A 35% (minority consensus) of the respondents claim that lead sources generated from secondary schools (high schools) and post-secondary schools (colleges) have the highest consensual importance validation for prospecting lead sources.

3. A 41% (minority consensus) of respondents claim that the ability to listen has the highest consensual importance validation for building rapport.

4. A 47% (minority consensus) of respondents claim that the ability to use open-ended, fact-finding questions has the highest consensual importance validation for identifying goals/needs/interests.
5. A 56% (majority consensus) of respondents claim that the ability to communicate the benefits of joining the Army that can help with the prospect’s need has the highest consensual importance validation for overcoming assumptions.

6. A 43% (minority consensus) of respondents claim that selecting a method of closing (e.g., single-choice, two-choice, already enlisted, challenge, weighted) has the highest consensual importance validation for engendering a commitment.

7. A 56% (majority consensus) of respondents claim that understanding sales methods (i.e., obviously you, re-stating the concern and just supposed (ORJ); feel, felt, found methods) has the highest consensual importance validation for overcoming barriers.

The overarching themes identified from the expert panel as very important in Round II continued the common themes discovered in Round I. Having product knowledge, active listening, open-ended, fact-finding questioning, and empathy while solving a need are identified as very important best practices identified in Round II. The findings of this round also support what current literature theory states regarding the importance of social and personal competencies that are needed for prospecting in relationship sales (Braberry & Greaves, 209; Freese, 2000; Kraues, 2013).

**Delphi Round III (Implementing) Major Findings**

Round III asked the expert panel to implement the highest importance consensus provided from Round II’s identified most important seven operationalized best practices into the four methods of prospecting (i.e., telephone, virtual, face-to-face and referral). The seven open-ended questions were developed, pilot tested, DMT validated, and
deployed for Round III. The questions were answered by 13 of the 19 expert panel members. The Round III qualitative data was organized into themes or categories by highest consensus prospecting method (telephone, face-to-face, virtual, and referral) and information about the outlying coded responses are described numerically in Chapter IV.

Based on the summative findings, the most frequent coded mode of prospecting is in telephone prospecting methods (a) goals must be specific, measurable, attainable, realistic, and timely (SMART) when working with lead sources; (b) active listening must be done in order to establish rapport; (c) market research on what the prospect wants (blueprint information) is required in order to tailor your fact-finding questions to establish goals/needs/interests; (d) only a limited amount of information should be provided to overcome assumptions.

The second highest coded method of Round III are face-to-face prospecting methods where (a) propensity must be planned; (b) engendering a commitment strategy that understands the applicant’s personality; (c) recruiter professionalism as necessary to overcome barriers.

Unexpected Findings

Unexpected findings are the unanticipated outcomes of the research (Roberts, 2010). Four unexpected findings were discovered:

1. Inexperience: out of the total force sustainment 79R MOS Army recruiters in Central California who are in positions of leadership (42), only (22) 52% were experienced recruiters (over 5 years of Army recruiting).
2. Appreciation: The expert panel and DMT expressed appreciation for best practice style of research. By identifying the things the recruiters are best at (appreciative inquiry) as a source to discover, build consensus and implement best practices, the research was positive and non-threatening. Appreciative inquiry is identifying what works in an organization and then attempting to replicate those successes in other areas (Hammond, 2013). Most past analysis was done on identifying problems.

3. Homogenous emotional intelligence results: The expert panel consistently commented in multiple rounds of research, identifying the importance of listening, asking open-ended, fact-finding questions, empathy, and rapport for best practices that produce desirable opportunities. These best practice themes are associated with emotional intelligence. “Emotional Intelligence (EQ) is one’s self-knowledge, self-awareness, social sensitivity, empathy and ability to communicate successfully with others. It is a sense of timing and social appropriateness, and having the courage to acknowledge weaknesses and express and respect differences” (Covey, 2004, p. 51).

4. Multiple singular outlying best practices: This breadth of implementation identifies multiple best practices that implement prospecting.

Conclusions

Recruiting researchers have emphasized that in order for the voluntary recruitment process to work during times of stress and conflict, the recruiters assigned to recruiting must have the assets, tools, and basic skills necessary to help applicants
understand that their own unique skills and abilities are compatible with Army service (Rostker, 2007; USAREC, 2015). This study was generalized for Army recruiting in order to understand a complex human relationship and identify best practices of successful prospecting. Prospecting was extensively researched, artifacts were collected, and prospecting terms were operationalized. Expert panel members looked intrinsically at themselves in order to share their best practices.

**Delphi Conclusions**

Prospecting best practices were identified that if successfully replicated can improve the chances of success of generating an appointment for an Army Interview. The majority of consensus best practice resources are in telephonic and face-to-face prospecting methods. Many outlying best practices exist in virtual or referral prospecting. Multiple homogeneous best practices themes that cross into many operationalized prospecting terms are associated with social awareness and relationship management skills. Recruiters that have an understanding these emotional intelligence core skills are able to effectively employ relationship sales methods that engender a commitment in multiple prospecting modes.

Empathetic listening, asking open-ended, fact-finding, purposeful questions and building rapport are prospecting themes that had the strongest best practice resource consensus findings of this research. These best practices are fundamentally necessary for identifying goals/needs/interests, engendering a commitment, and overcoming barriers. Which according to the expert panel, is necessary for successful prospecting.
It can also be deduced that empathetic listening should be continuous to the prospecting relationship. Recruiters need to hear what the applicant is communicating in order to answer their need/question. If recruiters do not use empathic listening strategies in the complex prospecting relationship they will not be successful in getting the applicant to agree to an appointment. Other homogenous themes are asking open-ended, fact-finding purposeful questions, identifying solutions to a need, and product knowledge. Asking purposeful questions, while active listening builds rapport, identifies goals/needs/interests, and ultimately engenders a commitment. Effective questioning leads to understanding and stimulates a conversation which can produce mutually beneficial ideas/possibilities to the prospect and the recruiter.

Rapport is a social competence relationship activity that is a byproduct of empathetic listening and purposeful questioning. It begins the conversation and ends it. In order to have empathy, you need understanding. In order to understand, you have to actively listen. Rapport is associated with emotional intelligence that requires social awareness and relationship management. Recruiters need social competence in order to build and maintain rapport. Since prospecting is a key task in recruiting, if recruiters are unsuccessful in getting appointments they will ultimately fail at beginning the recruiting process. Therefore, it can be concluded that recruiters who are socially competent are able to develop relationship management best practices will be more efficient in making recruiting mission.

This research and supporting literature state that expert recruiters close more often if they ask the right closing questions and understand how to read the subject to close by many methods. Each method of closing is uniquely adapted to each situation. Therefore,
if expert recruiters are able to ask better open-ended, fact-finding, purposeful questions in order to better understand the prospect, more sales opportunities will happen because of heightened empathy, trust, and rapport. Based on these findings, one can conclude that after the best practice of listening, asking purposeful questions, developing rapport is the third most fundamental aspect of prospecting best practices. The data analysis and literature concluded that by presenting opportunities for your prospect while employing empathy to share their needs, assumptions, and goals, while actively listening to understand, better prospecting results would be produced. This conclusion is supported by the synthesized outcome of the expert panel members consistently selecting closing methods based on listening, empathy, and rapport building as a best practice in engendering a commitment. Successful recruiters have empathy, look for ways to help people, and use relationship sales in order to close.

Based on the findings of this study and concurrence of the literature it is concluded that recruiters who plan to prospect will prospect more efficient. The recruiters who use best practices to strategically plan and know the recruiting area propensity will be more successful, efficient in making recruiting mission, and will reduce costs of prospecting.

In conclusion, if recruiters use the best practice implementation strategies (planning, social awareness, relationship management) identified in this research they will be successful in getting the applicant to agree to an appointment. Since prospecting is a key task in recruiting, if recruiters are successful in getting appointments they will ultimately begin the recruiting process and accomplish the force sustainment responsibilities to the Army and to the nation.
Implications for Action

Implications for action are the research findings that have practical inferences for change in the art of recruiting (Roberts, 2010). The identified prospecting best practices “have practical inferences for professional practice” (Roberts, 2010, p. 181) and may influence future recruiter actions, policy, or relationship sales strategies in industry, education, and the military are divided into national and local implications.

National Implications for Action.

The national implications are applicable to a global group of recruiting practitioners interested in understanding prospecting. National best practices have real-world implications for creating resilient prospecting practices that reach a broad audience. The national implications for action are:

1. Create the Army Recruiting Best Practice University focused on identifying recruiting best practices with the use of appreciative inquiry research, and emotional intelligence practices. This university could be developed similarly to the tactical Army University (http://armyu.army.mil) that is a repository for lessons learned and best practices for the purposes projecting land power. The following prospecting best practice planning focused training identified in this research should be taught to Army recruiters on how to employ:

   - SMART prospecting goal-setting and problem-solving strategies.
• Propensity planning. Pinpointing high return on investment areas to identify who the best prospects are and what approaches and techniques work best for generating more appointments/relationships/referrals.

• Social awareness listening and observing in order to accurately blueprint to pre-identify goals/needs/interests trends of prospects.

• Identifying professional responses to the needs identified in the social awareness process.

2. Conduct strategic best practice research and assessment identifying national trends and analysis. USAREC can develop the training, mentorship, and self-reflection methods needed to continuously adapt its recruiters to the changing needs of relationship based sales by resource leveling:

• Best practice pinpoint hot zones nationwide. Identify highly successful recruiters’ best practices.

• Create a national best practice strategic team that travels to best practice areas in order to replicate best practices nationwide.

• Facilitate mentorship from best practice hot zones areas to cross-level into low return areas. Mentor and match new recruiters with recruiters whom have been successful. Assign mentors to improve the overall prospecting rate for more efficient and effective telephone prospecting so that recruiters can reproduce successful best practices.

3. Share best practices by creating a 24/7 best practice recruiter knowledge hotline and website to educate recruiters on, Army programs, Army incentive programs,
and veteran’s benefits at the state and national level, Army outreach programs, and self-development.

4. Present key Delphi best practice action steps at conferences. Apply the best practice findings in this research to the world of human resources. A self reflective, resilient recruiting force would be able to internalize and understand best practice assessments, applying the findings, and change based on conclusions in order to optimize resources for future success. Understanding why the findings were developed in prospecting can help feed future recruiting resiliency that cuts across education, industry, military, and non-profit organization applications. For example, speak about best practice research at the international leadership association (ILA).

5. Develop best practice consulting. From the Delphi best practice research findings and conclusions identify how the four domains of emotional intelligence (self-awareness, self-management, social awareness, and relationship management) apply to relationship sales in education, industry, military, and non-profit applications. Client recruiters would be coached and mentored by best practice consultants in order to identify versatile best practices that apply to successful complex sales relationships. Recognizing different personality types and emotional intelligence areas of focus will allow human resource clients optimal recruiting tools.

**Local Implications for Action.**

Five local implications for action are:
1. Collaborate with industry relationship sales best practices. Invest funding and participate in professional relationship sales practice conferences. For example, attend “Sales 2.0 Conference– San Francisco; The DNA of a High-Performance Sales Team; July 18-19, 2016” (http://www.sales20conf.com/events.html). This conference provides proven leadership strategies to create a high-performance sales organization (http://www.sales20conf.com/Boston2016/).

2. Collaborate with industry and education emotional intelligence best practices. Attend conferences in order to learn current industry and education emotional intelligence best practices. For example, www.talentsmart.com or call 888.818.SMART which provides coaching, training and appraisals in emotional intelligence.

3. Recruiting leaders should conduct monthly self-assessments identifying best practices in every critical task of recruiting in order to replicate or adjust as necessary.

4. Develop focused, local best practice training to Army recruiters (a) how to acquire, identify, and utilize the secondary schools (high schools) and post-secondary schools (colleges) lists with the highest potential to meet enlistment standards; (b) employ empathetic listening techniques, connecting listening to asking for input, and giving and receiving feedback to establish rapport; (c) use of open-ended, fact-finding questioning methods in order to better understand the communication process of identifying goals/needs/interests; (d) build relationships by gaining a better understanding of the prospects’ perspectives,
needs, and motivators in order to overcome assumptions; (e) relationship sales training, including closing method planning, practice and execution in order to engender a commitment; (f) identify social competence methods that overcome barriers through open-ended, fact-finding questions, scenarios, and affirming the prospects concern, feelings, or need.

5. Participate in personality appraisal activities that help recruiters identify their own personality and the behavior and personality types of others so that recruiters can understand how to communicate with proven successful best practices based on personality. One such tool is the DiSC learning model. “The DiSC Profile is a nonjudgmental objective tool for understanding behavior types and personality styles. It helps people explore their behavior and the behavior of others across four primary dimensions” (Krause, 2013, p.5).

6. Participate in emotional intelligence appraisal activities. Social awareness and relationship management assessment activities will help recruiters identify their social competencies strengths and weaknesses. According to this best practice research, Army recruiters need to have high levels of social awareness and relationship management for more efficient and effective prospecting. Recommend that Army soldiers considering recruiting undergo an EI (Bradberry & Greaves, 2009) assessment as part of their recruiting application package. If it is determined that they have low EI social competence, then they would have to undergo training to improve those skills before being considered as a recruiter. After basic recruiter training, they should be assessed again at the recruiter schoolhouse for low EI. If they have low EI scores, they should be placed in
recruiting centers that have high EI social awareness team members in order to be mentored and monitored by a strong EI team so that the recruiters as a team can be more resilient.

Being able to recruit without the stress of constant failure by having best practice resources at your disposal would be very valuable to any recruiter. Appreciative inquiry understanding of best practices is a beginning toward improving prospecting in relationship sales. Relationships with the public it serves are the most important aspect of successful Army recruiting. Recruiters need to build relationships with lots of good people, institutions of higher learning, and businesses in order to find the prospects that could qualify for enlistment.

**Recommendations for Further Research**

Based on the study findings of expert Army recruiter leaders, the following are recommendations for further research:

1. Based on the lack of virtual prospecting best practice data provided in this research, it is recommended that more investigative research be done on discovering how to shape the prospecting market by virtual prospecting. Find successful virtual prospectors to conduct appreciative inquiry best practice research.

2. Replicate best practice research methodology to identify and describe other key tasks in recruiting. This research has identified just one part of recruiting-prospecting.
3. Best prospecting practices have been identified in this research by a consensus of expert recruiters. However, a limitation to this study is the understanding of the individual prospecting best practice outliers that were not studied because they lacked consensus. Outliers that are not a consensus may be the future of transformational prospecting. A qualitative study exploring the outliers directly from the recruiters can provide data either supporting consensus or eliminating the outliers previously identified.

4. Conduct a national quantitative study of Army recruiters from across the United States in order to identify similar personal and social competencies identified in this best practice research. Conduct a macro data analysis identifying any different or validated this study’s best practices.

5. Conduct a replication prospecting best practice study for the rest of the Armed Forces: Navy, Marines, Air Force and Coast Guard recruiters; industry; education; other partner nations Armed Forces.

6. Conduct a best practices study to determine if there is a correlation of planning practices effort and the amount return on investment.

7. Conduct a best practices study to determine if there is a correlation of effort to engendering a commitment and how the amount of effort impacts prospecting results. Identify if there is an engendering commitment optimal zone.

8. Recommend identifying a gender best practice research study in order to identify the impact of gender on establishing rapport in order to effectively prospect.
Identify if gender in the 17-24yr old markets is prospected differently based on gender in order to engender a commitment.

**Concluding Remarks and Reflections**

By utilizing expert Army recruiter leaders, the research was able to have a greater understanding of the recruiting process of prospecting. The Delphi research of real experience, historical successes and literature support that the ability to initiate rapport through empathy, active listening, purposeful questioning, and identifying methods that solve a need are essential best practices in prospecting.

The military recruiting landscape has significantly changed since the all-volunteer force inception 45 years ago. Expert recruiters understand that lag in what they do now affects the recruiting funnels of the future. Telephone and face-to-face prospecting have the most consensus. Virtual prospecting methods have emerged, yet very little best practice consensus is identified in this research. However, even the small outlying data can possibly produce improvements in virtual prospecting best practice understanding. Hopefully, this research may begin the discussion on the modern recruiting systems of the future.

I have grown as a person during this research. Instead of the traditional approach of looking for problems this research looked for best practices. I have a better understanding of the difficulties Army recruiters face. I was able to recognize my inexperience and surround myself with positive mentors in order to overcome my shortcomings. Nothing done in this research was done alone. I was able to surround myself with exemplary mentors. Through joy, empathy, and mentorship this research was concluded.
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APPENDIX A

Army Sponsorship

DEPARTMENT OF THE ARMY
United States Army Recruiting Battalion Central California
Bldg 730 Enterprise Ave
Lemoore, California 93245

REPLY TO
ATTENTION OF

RCWE-CC-ESS 30 July 2015

MEMORANDUM FOR RECORD

SUBJECT: Sponsorship to Conduct Research in Prospecting Best Practices

1. REFERENCES:

   1.a. AR 25-2 (Information Assurance) RAR 001, 03/23/2009
   1.b. AR 360-1 (The Army Public Affairs Program) 05/25/2011
   1.c. DoDI 1100.13 (DoD Surveys) 01/15/2015
   1.d. DoDI 8910.01 (Information Collection and Reporting) 5/19/2014,
   1.e. DoDI 5400.16 (DoD Privacy Impact Assessment (PIA) Guidance) 7/14/2015
   1.f. DoDI 3216.02 (Protection of Human Subjects and Adherence to Ethical Standards in DoD-Supported Research) 11/8/2011
   1.g. DoDD 5230.09 (Clearance of DoD Information for Public Release) 08/22/2008

2. Dissertation Title


3. Purpose Statement

   a. The purpose of this study is to discover what the most effective practices, are in telephone, virtual, and face-to-face prospecting as reported by an expert panel of Army Recruiters in Central California to effectively target 17-24 year olds.

4. Methodology

   a. The following questions will be investigated to address the purpose of the study during three rounds of interviews. Round one will be brainstorming, round two will be censuses building and round three will be identifying.

   b. Round One-Brainstorming: The expert panel will be provided open ended response questions to identify and describe what the telephone, virtual and face to face prospecting best practices are in order to guide future prospecting for 17-24 year olds.
c. Round Two-Census Building: To what degree and why are the telephone, virtual and face to face prospecting best practices, as identified in Round 1 to guide future prospecting for 17-24 year olds important to Army recruiting.

d. Round Three-Identifying: Of the telephone, virtual and face to face prospecting best practices, as identified in Round 2, to guide future prospecting for 17-24 year olds what are the top three justified approaches to implementing each one in order to develop future recruiters.

e. Cost estimate Methodology Statement: 15-20 minutes to complete each survey. Three surveys total whose mode of operation is remote, anonymous, and computerized. The rounds are sequential (each have a week to respond) and take three weeks total to be collected by the researcher. One GS-11 (researcher) and 29 expert panel members (E-7 average). The experts are comprised of Company First Sergeants, Center Leaders and Master Trainers: totaling approximately 29 expert panel members. No cost for the panel to utilize online collection and conferencing communications.

5. Sponsorship.

a. Surveys and other types of information collection administered within or across OSD or DoD components must be licensed and comply with multiple policies (DoDI 1100.13 “DoD Surveys,” January 15, 2015 and DoDI 8910.01), “Information Collection and Reporting.” May 19, 2014). Surveys are defined by DoD as “systematic data collections, using personal or telephonic interviews, or self-administered questionnaires, in paper or digital format, from a sample or census of 10 or more persons as individuals or representatives of agencies that elicit attitudes, opinions, behavior, and related demographic, social, and economic data to identical questions that are to be used for statistical compilations for research or policy assessment purposes.”

b. Surveys, interviews and focus groups of Army personnel conducted by military or civilian students or by parties external to the Army require an Army Sponsor at the O-6 level or above (or civilian equivalent).

c. As the Army Sponsor I affirm that the information collection is mission critical and will be worth the time/cost of Soldiers’ participation, and acknowledge that the sponsor/sponsor’s office assumes responsibility for ensuring that the information collection meets all regulatory requirements including all requirements detailed in the survey request form.

d. All summary research results will be presented to me before publishing.

EVERARDO ALANIS
LTC, LG
Commanding
APPENDIX B

Brandman University IRB Approval

BRANDMAN UNIVERSITY INSTITUTIONAL REVIEW BOARD
IRB APPLICATION ACTION – APPROVAL
COMPLETED BY BUIRB

IRB ACTION/APPROVAL

Name of Investigator/Researcher: Jeremy E. McMullen

[ ] Returned without review. Insufficient detail to adequately assess risks, protections and benefits.
[ ] Approved/Certified as Exempt form IRB Review.
[ ] Approved as submitted.
[ ] Approved, contingent on minor revisions (see attached)
[ ] Requires significant modifications of the protocol before approval. Research must resubmit with modifications (see attached)
[ ] Researcher must contact IRB member and discuss revisions to research proposal and protocol.

Level of Risk: [ ] No Risk  [ ] Minimal Risk [ ] More than Minimal Risk

IRB Comments:


Dr. Timothy Perez

IRB Reviewer:
Telephone: ___________________________ Email: tperez@brandman.edu

BUIRB Chair: Doug DeVore  Date: 12/03/15

REVISED IRB Application

[ ] Approved  [ ] Returned

Name: ___________________________

Telephone: ___________________________ Email: ___________________________ Date: ___________________________

BUIRB Chair: ___________________________

APPENDIX C

Brandman University IRB Modification Approval

BRANDMAN UNIVERSITY INSTITUTIONAL REVIEW BOARD
REQUEST FOR MODIFICATION OF APPROVED PROJECT

☐ The modification/amendment described on page 1 qualifies for and has been approved by expedited review.

☑ The modification/amendment described on page 1 has been reviewed and approved by the Brandman University Institutional Review Board.

☐ The modification/amendment described on page requires additional changes to secure approval.

COMMENTS:

Request to change your BUIRB application review from expedited to exempt has been approved. The approval is based on the criteria you provided in the application for modification and the statement from Hyde, Sandra L CIV US ARMY HQDA (US) in her email regarding the opinion that the US Army would perceive this to be exempt.

Digitally signed by Doug DeVore
DN: cn=Doug DeVore, o=Brandman University, ou=EOCIL, email:mdawson@brandman.edu
Date: 2016.01.04 13:26:59 -07'00'

Chair, Brandman University Institutional Review Board

January 4, 2016

Date
APPENDIX D

Army Human Research Protection Office (AHRPO)

MEMORANDUM FOR Jeremy McMullen, Brandman University, 9501 Hwy 41, Lemoore, CA 93245, jmcmullen@mail.brandman.edu

SUBJECT: Research Protections Administrative Review (RPAR)
Protocol Title: Recruiting best practices in prospecting. Developing the skills necessary to recruit an all-volunteer Army-A Delphi study of expert Army recruiters in Central California.
Principal Investigator: Jeremy McMullen
Protocol Number: 11181501

1. Review Outcomes

The Army Human Research Protections Office (AHRPO) RPAR of the above referenced protocol is complete. RPAR review is required to ensure Department of Defense (DOD) supported research involving human subjects is compliant with the DODI 3216.02. DOD supports human subjects research by providing some of the resources including but not limited to funding, facilities, equipment, personnel, access to or information about DOD personnel for recruitment, or identifiable data or specimens from living individuals. DOD is supporting the above referenced activity by providing access to DOD personal for recruitment.

2. Requirements

Substantive Changes to the Protocol: The AHRPO must review and accept the IRB’s determination when substantive modifications are made to this research protocol, and any modifications that could potentially increase risk to subjects, before the changes are implemented to ensure compliance with the DODI 3216.02. Substantive modifications include a change in principal investigator, change or addition of an institution, elimination or alteration of the consent process, change to the study population that has regulatory implications (e.g., adding children, adding active duty population, etc.), significant change in study design (i.e., would prompt additional scientific review), or a change that could increase risks to subjects.

Continuing Review: The AHRPO must ensure an appropriate continuing review occurred within the required timeframe. Submit communication from the IRB regarding any lapse in IRB approval.

Study Closure: The AHRPO should be informed of the date and reason for study closure (i.e., study completed, insufficient enrollment to sustain the research, etc). The AHRPO must receive the final study report submitted to the IRB, including a copy of any acknowledgement documentation and any supporting documents, as soon as all documents become available.
## APPENDIX E

### Recruiting Literature Synthesis Matrix

<table>
<thead>
<tr>
<th>References</th>
<th>Recruiting</th>
<th>Prospecting</th>
<th>Telephone</th>
<th>Virtual</th>
<th>Face-to-face</th>
<th>Applicant</th>
<th>Recruiter</th>
<th>Org. Centered</th>
<th>Referral</th>
</tr>
</thead>
</table>

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APPENDIX F

Request to Participate in Prospecting Best Practice Research

RCWE-CC-ESS 26 August 2015

MEMORANDUM FOR RECORD

SUBJECT: Request To Participate as an Expert Panel Member for Prospecting Best Practices Research

The Fresno Army Recruiting Battalion Commander, Lieutenant Colonel Alanis, has granted me permission to conduct prospecting best practice research in the Central California Army Recruiting area of operations. The 6th Army Recruiting Brigade Commander, Colonel Earl Caleb has agreed to sponsor the research.

As a current doctoral student in Organizational Leadership at Brandman University School of Education and as the Battalion’s Education Service Specialist for Fresno Army Recruiting Command I understand the importance of having effective prospecting practices. The purpose of this Delphi study is to discover what the best practices are for implementing telephone, virtual, face-to-face, and referral prospecting, as identified by an expert panel of Army Recruiters in Central California when targeting 17-24 year olds.

I would like to ask for your help as volunteering to be part of an expert panel for my study. In order to be considered an expert for the purpose of this research you to have met the following four requirements:

1. Have at a minimum of five years as an Army Recruiter.
2. Be in a position of influence; i.e., Center Leaders, Master Trainers/Operations/MEPs, and Company 1st Sergeants.
3. A senior Non Commissioned Officers-NCOs.
4. Completed advanced recruiter training, e.g., Recruiting Center Leaders Course (RCLC), Station Commanders Course (SCC), Center Leaders Course (CLC).

By agreeing to become an expert panel member you also agree to participate in Delphi research with includes three electronic surveys (over three weeks) which take from (15 to 20 minutes each) and will be sent directly to your email as a max.gov survey link. At a time convenient for you but within the week of the survey being sent you, you will need to respond.

If you agree to participate in the surveys, you may be assured that it will be completely confidential. THIS IS NOT AN EVALUATION ACTIVITY. NO SURVEY WILL BE CONNECTED TO A RECRUITER. All responses will be combined to develop the next round of survey consolidation. Your responses are anonymous. No one will be able to
connect your questionnaire to you personally. No names will be attached to any notes or records from the interview. All information will remain in locked files or password protected, accessible only to the researchers. No supervisor will have access to the survey information. You will be free to stop the survey and withdraw from the study at any time. Further, you may be assured that the researcher is not in any way affiliated with policy administration, nor in a supervisory position of the organization.

Should you have any questions, please contact me, the research director, at jeremy.e.mcmullen2.civ@mail.mil, Office: (559) 817-3143, Cell: (559) 410-1183 or student email at jmcmulle@brandman.edu. Your participation will be greatly valued and could change the future of prospecting.
APPENDIX G

Informed Consent Form

CONSENT TO PARTICIPATE IN RESEARCH

22 December 2015

Recruiting Best Practices in Prospecting: Developing the Skills Necessary to Recruit an All-Volunteer Army-A Delphi Study.

BRANDMAN UNIVERSITY
16355 LAGUNA CANYON ROAD
IRVINE, CA 92618

RESPONSIBLE INVESTIGATOR: Jeremy McMullen

SPONSORS OF STUDY: Col Earl Caleb, 6th Army Recruiting Brigade Commander and Everardo Alanis, 6th Army Recruiting Battalion Fresno Commander

NEED FOR THE STUDY: This study is critical to the Army mission because numerous studies have identified successful recruiter traits and employee motivation in industry, education, and in the Army (Cortez, 2014; Murray, 2010). None have looked at empirical evidence to improve the art of prospecting with best practices. Prospecting is a skill that begins the recruiting process which needs constant planning and refinement. Just like any skill, practice is needed in order to achieve mastery. This best practice prospecting research may help recruiters, recruiting processes, and the Army improve the recruiting funnel. The data from this study will also be included as Doctoral research that is necessary for submission as partial fulfillment of the requirements for the Doctor of Education degree in Organizational Leadership for Jeremy McMullen-an Army Education Service Specialist and student with Brandman University.

PURPOSE OF STUDY: The purpose of this Delphi study is to discover what the best practices are for implementing telephone, virtual, face-to-face, and referral prospecting, as reported by an expert panel of Army Recruiters in Central California when targeting 17-24 year olds.

- The research will strive to discover meaningful and effective best practices of prospecting for Army recruiters.
- This research will fill in the gap in the literature regarding specific recruiting practices like prospecting.
- The results of this study may assist future prospecting policy planning for Army recruiting.
- This study may also provide much needed information and data for industry, education and other branches of the military on prospecting best practices.
By participating in this study, I agree to participate as an expert panel member and freely express my opinions in best practice prospecting. Informed consent is being requested so you are aware of what is being asked and how it will be used. A copy of this informed consent will be provided, to ensure you are aware of the potential risks and benefits of participation. Participation is voluntary as all questions are voluntary as per DoD guidelines, such that you can skip any questions if you desire.

**DESCRIPTION OF WHAT WILL BE SURVEYED:** Every week, in one-week intervals, over a period of three consecutive weeks, a new round of questionnaires will be provided for your expert input. The three surveys will be conducted electronically via E-mail: 15-20 minutes are required to complete each survey. The mode of operation is remote, anonymous, and computerized. The rounds are sequential (each have a week to respond) and take three weeks total to be collected by the researcher. Completion of all three rounds of the expert panel instruments will take place January 2016.

I understand that:

a) There are minimal risks associated with participating in this research. Participation in surveys and focus groups is voluntary. The surveys should take approximately 15-20 minutes of time to fill out. All responses will be combined to develop the next round of survey consolidation. The responses are anonymous. THIS IS NOT AN EVALUATION ACTIVITY. NO SURVEY WILL BE CONNECTED TO A RECRUITER. The Investigator will protect my confidentiality by keeping the research materials in a password protected computer or locked file drawer that is available only to the researcher and retained for five years. No personally identifiable information (PII), (such as, names, Social Security Numbers [SSNs], e-mail addresses, Internet Protocols [IP] addresses, street addresses, telephone numbers) will be attached to the answers once they have been received from the respondent.

b) The possible benefit of this study to me is that my input may help add to the research regarding prospecting best practices have on developing future Army recruiters and Army recruiting policy. The findings will be available to me at the conclusion of the study.

c) Any questions I have concerning my participation in this study will be answered at any time by Jeremy McMullen. He can be reached by email at [Jeremy.e.mcmullen2.civ@mail.mil](mailto:Jeremy.e.mcmullen2.civ@mail.mil), Office: (559) 817-3143, Cell: (559) 410-1183. His school email is jmcmulle@mail.brandman.edu

d) My participation in this research study is voluntary. I may decide to not participate in the study and I can withdraw at any time. I can also decide not to answer particular questions during the interview if I so choose. I understand that I may refuse to participate or may withdraw from this study at any time without any negative consequences. Also, the Investigator may stop the study at any time.
e) No information that identifies me will be released without my separate consent and that all identifiable information will be protected to the limits allowed by law. If the study design or the use of the data is to be changed, I will be so informed and my consent re-obtained. I understand that if I have any questions, comments, or concerns about the study or the informed consent process, I may write or call the Office of the Executive Vice Chancellor of Academic Affairs, Brandman University, at 16355 Laguna Canyon Road, Irvine, CA 92618, (949) 341-7641.

ACKNOWLEDGEMENT: I acknowledge that I have received a copy of this form and the “Research Participant’s Bill of Rights.”

I have read the above and understand it and hereby consent to the procedure(s) set forth.

________________________________________
Printed Name of Participant

________________________________________
Signature of Participant                     Date
APPENDIX H

Research Participant’s Bill of Rights

BRANDMAN UNIVERSITY INSTITUTIONAL REVIEW BOARD

Any person who is requested to consent to participate as a subject in an experiment, or who is requested to consent on behalf of another, has the following rights:

1. To be told what the study is attempting to discover.
2. To be told what will happen in the study and whether any of the procedures, drugs or devices are different from what would be used in standard practice.
3. To be told about the risks, side effects or discomforts of the things that may happen to him/her.
4. To be told if he/she can expect any benefit from participating and, if so, what the benefits might be.
5. To be told what other choices he/she has and how they may be better or worse than being in the study.
6. To be allowed to ask any questions concerning the study both before agreeing to be involved and during the course of the study.
7. To be told what sort of medical treatment is available if any complications arise.
8. To refuse to participate at all before or after the study is started without any adverse effects.
9. To receive a copy of the signed and dated consent form.
10. To be free of pressures when considering whether he/she wishes to agree to be in the study.

If at any time you have questions regarding a research study, you should ask Jeremy McMullen, (559) 817-3143 to answer them. You also may contact the Brandman University Institutional Review Board, which is concerned with the protection of volunteers in research projects.

The Brandman University Institutional Review Board may be contacted either by telephoning the Office of Academic Affairs at (949) 341-9937 or by writing to the Vice Chancellor of Academic Affairs, Brandman University, 16355 Laguna Canyon Road, Irvine, CA, 92618.
APPENDIX I

MAX Survey - USAREC Demographic Survey of Expert Army Recruiter Panel Members

**Purpose Statement:** The purpose of this Delphi study is to discover what the best practices are for implementing telephone, virtual, face-to-face, and referral prospecting, as identified by an expert panel of Army Recruiters in Central California when targeting 17-24 year olds.

There are minimal risks associated with participating in this research. Participation in surveys and focus groups is voluntary. The surveys should take approximately 15-20 minutes of time to fill out. The responses are anonymous. No one will be able to connect your questionnaire to you personally. THIS IS NOT AN EVALUATION ACTIVITY. NO SURVEY WILL BE CONNECTED TO A RECRUITER. The Investigator will protect all participants confidentiality by keeping the research materials in a password protected computer or locked file drawer that is available only to the researcher and is retained for five years. No personally identifiable information (PII), (such as, names, Social Security Numbers [SSNs], email addresses, Internet Protocols [IP] addresses, street addresses, telephone numbers) will be attached to the answers once they have been received from the respondent.

**Need for the survey:** Numerous studies have identified successful recruiter traits and employee motivation in industry, education, and in the Army; yet, none have looked at empirical evidence to improve the art of prospecting with best practices. Prospecting is a skill that needs constant planning, refinement and begins the recruiting process. Just like any skill, practice is needed in order to achieve mastery.

The possible benefit of this study is that it may help add to prospecting best practice research. The findings will be available at the conclusion of the study and will provide new insights about what the most effective practices are in telephone, virtual, and face-to-face prospecting as reported by an expert panel of Army recruiters in Central California to effectively target 17-24 year olds.

There are 7 questions in this survey

Expert Army Recruiter Characteristics
1. How much recruiting experience do you have in the profession of Army recruiting? *
   Please choose only one of the following:
   - Less than 5 years.
   - More than 5 years and less than 10 years.
   - Between 10 and 15 years.
   - Over 15 years.
2. What is your current position of influence in Army recruiting? *
   Please choose only one of the following:
   - Battalion Master Trainer.
   - Operations NCO.
Military Entrance Processing Station (MEPS) Guidance Counselor. 
First Sergeant (1SG). 
Center Leader. 

3. What is your highest rank held? * 
Please choose only one of the following: 
Sergeant First Class (SFC) 
Master Sergeant (MSG) 
First Sergeant (1SG) 
Sergeant Major (SGM) 

4. Are you a graduate of advanced recruiter training-e.g., Recruiting Center Leaders Course (RCLC), Station Commanders Course (SCC), Center Leaders Course (CLC)? * 
Please choose only one of the following: 
Yes 
No 

Individual demographics 
5. What is your gender? 
Please choose only one of the following: 
Male 
Female 

6. What is your age? 
Please choose only one of the following: 
28 or younger 
29-33 
34-40 
41-45 
46 or older 

7. What is the highest level of school you have completed or the highest degree you have received? 
Please choose only one of the following: 
Less than a high school diploma 
High school diploma or equivalent (e.g., GED, Proficiency). 
Some college but no degree. 
Associate degree. 
Bachelor's degree. 
Graduate or professional degree. 

This concludes the demographic portion of best practice in prospecting research. Your honest answers are very much appreciated. For more information, contact the survey’s Principal Investigator: Jeremy E. McMullen, jeremy.e.mcmullen2.civ@mail.mil, Office: (559) 817-3143, Cell: (559) 410-1183. Submit your survey. Thank you for completing this survey.
APPENDIX J

MAX Survey - USAREC Round I Survey-Brainstorming

USAREC Round I Survey-Brainstorming

Purpose Statement: The purpose of this Delphi study is to discover what the best practices are for implementing telephone, virtual, face-to-face, and referral prospecting, as identified by an expert panel of Army Recruiters in Central California when targeting 17-24 year olds.

Background: This is the first of three consecutive rounds of questionnaires provided for your expert input regarding prospecting best practices. This electronic survey will require approximately 15-20 minutes to complete. The mode of operation for this survey is remote, anonymous, and computerized. THIS IS NOT AN EVALUATION ACTIVITY. NO SURVEY WILL BE CONNECTED TO A RECRUITER.

Need for the survey: Numerous studies have identified successful recruiter traits and employee motivation in industry, education, and in the Army, yet none have looked at empirical evidence to improve the art of prospecting with best practices. Prospecting is a skill that needs constant planning, refinement and begins the recruiting process. Just like any skill, practice is needed in order to achieve mastery. The possible benefit of this study is its potential to help add to prospecting best practice research. The findings will be available at the conclusion of the study and will provide new insights about what best practices are in telephone, virtual, and face-to-face prospecting as reported by an expert panel of Army recruiters in Central California to effectively target 17-24 year olds.

Directions: Please write as detailed as possible in the answer text boxes what you feel are best prospecting practices when effectively targeting 17-24 year olds. Please do not include personally identifiable information (PII) or operationally sensitive information. All answers matter! Please submit within one week of receipt of the survey. There are 7 questions in this survey.
1. Planning practices are prospecting systems that are developed with the intent to support, assist, grow, and promote prospecting (i.e., Recruiting Operation Planning (ROP), Backwards Planning, Synchronization, etc.). Explain best practices regarding prospecting planning when targeting 17-24 year old markets.

Please write your answer here:

Develop Prospecting Lead Sources for Telephone, Virtual, and Face-to-Face Prospecting

2. Lead sources acquire principal contact resources that allow recruiters to have contact with prospects (i.e., high school contact lists, college contact lists, marketing leads list, future soldier generated contact lists, etc.). Explain best practices in lead sources for prospecting when targeting 17-24 year old markets.

Please write your answer here:
Establishing Rapport for Telephone, Virtual, and Face-to-Face Prospecting

3. Rapport is a mutual understanding, trust, and agreement between you and the prospect (i.e., ask questions, use of humor, agree on common interests, listen, etc.). Explain the best practices for initiating rapport in prospecting when targeting 17-24 year old markets.

* 

Please write your answer here:

Identify Goals/Needs/Interests in Telephone, Virtual, and Face-to-Face Prospecting

4. Identify goals/needs/interests is information gathering in order to discuss the prospects essential objectives (i.e., active listening, open ended questions, scripts, etc.). Explain the most effective prospecting practices that identify goals/needs/interests when targeting 17-24 year old markets.

* 

Please write your answer here:
Overcome Assumptions in Telephone, Virtual, and Face-to-Face Prospecting

5. Assumptions are beliefs or statements that are assumed to be true or from which a conclusion can be drawn (i.e., seek to understand, ask follow on questions, restate the answer, etc.). Explain the most effective prospecting practices that eliminate assumptions when targeting 17-24 year old markets.

Please write your answer here:

Engender a Commitment in Telephone, Virtual, and Face-to-Face Prospecting

6. Engendering a commitment produces obligation (i.e., identify goals and passions, asking for an appointment, etc.). Explain the most effective prospecting practices that engender a commitment when targeting 17-24 year old markets.

Please write your answer here:
7. Barriers are obstacles, inefficiencies or waste that prevents prospecting (i.e., poor training, no planning, no accountability, etc.) Explain the most effective prospecting practices that overcome barriers when targeting 17-24 year old markets.

* 

Please write your answer here:

This concludes Round I of three of prospecting best practice research. Your honest answers are very much appreciated. Thank you for participating in this important research. For more information contact the survey’s Principal Investigator: Jeremy E. McMullen, jeremy.e.mcmullen2.civ@mail.mil, Office: (559) 817-3143, Cell: (559) 410-1183. Submit your survey. Thank you for completing this survey.
APPENDIX K

MAX Survey - USAREC Round II Survey-Consensus Building

USAREC Round II Survey-Consensus Building

**Background:** This is the second of three consecutive rounds of questionnaires provided for your expert input regarding prospecting best practices. This electronic survey will require approximately 15-20 minutes to complete. The mode of operation for this survey is remote, anonymous, and computerized. THIS IS NOT AN EVALUATION ACTIVITY. NO SURVEY WILL BE CONNECTED TO A RECRUITER.

**Directions:** Although all answer choices may be important, this research is attempting to identify the “best practice” so a rating of very important, important, somewhat important and least important must be determined. Please rate the most important prospecting practices as identified in Round I when targeting 17-24 year old markets in the boxes provided. Please rate the degree of confidence you have in implementing prospecting best practices identified in Round I when targeting 17-24 year old markets in the appropriate response boxes provided.

There are 7 questions in this survey

Planning Prospecting Best Practices Rating Degree of Importance (Priority or Relevance)

1. Planning practices are prospecting systems that are developed with the intent to support, assist, grow, and promote prospecting (i.e., Mission Accomplishment Plan (MAP), Recruiting Operation Planning (ROP), Backwards Planning, Synchronization, etc.). Rate the most important planning prospecting best practices that were identified in Round I when targeting 17-24 year old markets.

All your answers must be different.

| Understanding propensity of the recruiting area is the best prospecting practice to planning. | Very Important | Important | Slightly Important | Least Important |
| Understanding product knowledge is the best prospecting practice to planning. | ⭕️ | ⭕️ | ⭕️ | ⭕️ |
| Understanding Recruiting Operation Planning (ROP) is the best prospecting practice to planning. | ⭕️ | ⭕️ | ⭕️ | ⭕️ |
Understanding your target market’s decision influencers is the best prospecting practice to planning.

Lead Sources Prospecting Best Practices Rating Degree of Importance (Priority or Relevance)
2. Lead sources acquire principal contact resources that allow recruiters to have contact with prospects (i.e., high school list, college lists, marketing leads list, future soldier generated, etc.). Rate the most important lead sources for prospecting best practices that were identified in Round I when targeting 17-24 year old markets.

All your answers must be different.

<table>
<thead>
<tr>
<th>Lead Sources Generated by Target Market Peers (Future Soldiers, Other Interested but Not Qualified) is the Best Prospecting Practice.</th>
<th>Very Important</th>
<th>Important</th>
<th>Slightly Important</th>
<th>Least Important</th>
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</table>

<table>
<thead>
<tr>
<th>Lead Sources Generated from Secondary Schools (High Schools) and Post-Secondary Schools (Colleges) is the Best Prospecting Practice.</th>
<th>Very Important</th>
<th>Important</th>
<th>Slightly Important</th>
<th>Least Important</th>
</tr>
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<tbody>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Lead Sources Generated from Influencers is the Best Prospecting Practice.</th>
<th>Very Important</th>
<th>Important</th>
<th>Slightly Important</th>
<th>Least Important</th>
</tr>
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<tbody>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Self-Generated Lead Generating Activities (i.e., Classroom Presentations, College/Career Fairs) is the Best Prospecting Practice.</th>
<th>Very Important</th>
<th>Important</th>
<th>Slightly Important</th>
<th>Least Important</th>
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</table>

Establishing Rapport Prospecting Best Practices Rating Degree of Importance (Priority or Relevance)
3. Rapport is a mutual understanding, trust, and agreement between you and the prospect (i.e., ask questions, use of humor, agree on common interests, listen, etc.). Rate the most important rapport prospecting best practices that were identified in Round I when targeting 17-24 year old markets.

All your answers must be different.
### Identify Goals/Needs/Interests Prospecting Best Practices Rating Degree of Importance

4. Identify goals/needs/interests is information gathering in order to discuss the prospects essential objectives (i.e., active listening, open ended questions, scripts, etc.). Rate the most important goals/needs/interests prospecting best practices that were identified in Round I when targeting 17-24 year old markets.

All your answers must be different.

<table>
<thead>
<tr>
<th>Best Practice</th>
<th>Very Important</th>
<th>Important</th>
<th>Slightly Important</th>
<th>Least Important</th>
</tr>
</thead>
<tbody>
<tr>
<td>The ability to use open ended fact-finding questions is the best prospecting practice to identifying goals/needs/interests.</td>
<td>●</td>
<td>●</td>
<td>●</td>
<td>●</td>
</tr>
<tr>
<td>The ability to actively listen is the best prospecting practice to identifying goals/needs/interests.</td>
<td>●</td>
<td>●</td>
<td>●</td>
<td>●</td>
</tr>
<tr>
<td>The ability to demonstrate how product knowledge can help prospects is the best prospecting practice to identifying goals/needs/interests.</td>
<td>●</td>
<td>●</td>
<td>●</td>
<td>●</td>
</tr>
</tbody>
</table>
The ability to project a better future for the applicant is the best prospecting practice to identifying goals/needs/interests.

Overcoming Assumptions Prospecting Best Practices Rating Degree of Importance (Priority or Relevance)
5. Assumptions are beliefs or statements that is assumed to be true and from which a conclusion can be drawn (i.e., seek to understand, and follow on questions, restate the answer, etc.). Rate the most important overcoming assumptions prospecting best practices that were identified in Round I when targeting 17-24 year old markets.

All your answers must be different.

<table>
<thead>
<tr>
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<th>Very Important</th>
<th>Important</th>
<th>Slightly Important</th>
<th>Least Important</th>
</tr>
</thead>
<tbody>
<tr>
<td>The ability to restate what the prospect has said is the best prospecting practice to overcoming assumptions.</td>
<td>●</td>
<td>●</td>
<td>●</td>
<td>●</td>
</tr>
<tr>
<td>The ability to share a common experience with what the prospect has said is the best prospecting practice to overcoming assumptions.</td>
<td>●</td>
<td>●</td>
<td>●</td>
<td>●</td>
</tr>
<tr>
<td>The ability to communicate current improvements in the Army is the best prospecting practice to overcoming assumptions.</td>
<td>●</td>
<td>●</td>
<td>●</td>
<td>●</td>
</tr>
<tr>
<td>The ability to communicate the benefits of joining the Army that satisfies their need is the best prospecting practice to overcoming assumptions.</td>
<td>●</td>
<td>●</td>
<td>●</td>
<td>●</td>
</tr>
</tbody>
</table>

Engender a Commitment Prospecting Best Practices Rating Degree of Importance (Priority or Relevance)
6. Engendering a commitment produces obligation (i.e., identify goals and passions, asking for an appointment, etc.). Rate the most important engendering commitment prospecting best practices that were identified in Round I when targeting 17-24 year old markets.
All your answers must be different.

<table>
<thead>
<tr>
<th></th>
<th>Very Important</th>
<th>Important</th>
<th>Slightly Important</th>
<th>Least Important</th>
</tr>
</thead>
<tbody>
<tr>
<td>Closing for commitment to an appointment at the end of each stage of conversation is the best prospecting practice to engendering a commitment.</td>
<td>●</td>
<td>●</td>
<td>●</td>
<td>●</td>
</tr>
<tr>
<td>Providing an overview of the points discussed is the best prospecting practice to engendering a commitment.</td>
<td>●</td>
<td>●</td>
<td>●</td>
<td>●</td>
</tr>
<tr>
<td>The ability to get and maintain rapport is the best prospecting practice to engendering a commitment.</td>
<td>●</td>
<td>●</td>
<td>●</td>
<td>●</td>
</tr>
<tr>
<td>Selecting a method of closing (e.g., single-choice, two-choice, already enlisted, challenge, weighted) is the best prospecting practice when engendering a commitment.</td>
<td>●</td>
<td>●</td>
<td>●</td>
<td>●</td>
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</tbody>
</table>

Overcome Barriers Prospecting Best Practices Rating Degree of Importance (Priority or Relevance)

7. Barriers are obstacles, inefficiencies or waste that prevents prospecting (i.e., poor training, no planning, no accountability, etc.). Rate the most important overcoming barriers prospecting best practices that were identified in Round I when targeting 17-24 year old markets.

All your answers must be different.

<table>
<thead>
<tr>
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<th>Very Important</th>
<th>Important</th>
<th>Slightly Important</th>
<th>Least Important</th>
</tr>
</thead>
<tbody>
<tr>
<td>Increasing training in Army product knowledge is a best prospecting practice when overcoming barriers.</td>
<td>●</td>
<td>●</td>
<td>●</td>
<td>●</td>
</tr>
<tr>
<td>Understanding selecting methods (i.e., Obviously, re-stating or just supposed (ORJ), feel, felt, found methods) are the best prospecting practice when overcoming barriers.</td>
<td>●</td>
<td>●</td>
<td>●</td>
<td>●</td>
</tr>
<tr>
<td>Improving the recruiting operation plan (ROP) is the best prospecting practice when overcoming barriers.</td>
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</tr>
<tr>
<td>Improving internal team accountability is the best prospecting practice when overcoming barriers.</td>
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</tr>
</tbody>
</table>

This concludes round II of three rounds. For more information contact the survey’s Principal Investigator: Jeremy E. McMullen, jeremy.e.mcmullen2.civ@mail.mil, Office: (559) 817-3143, Cell: (559) 410-1183. Submit your survey. Thank you for completing this survey.
APPENDIX L

MAX Survey - USAREC Round III Survey-Implementing

USAREC Round III Survey-Implementing

Background: This is the summative research which is the third of three consecutive rounds of questionnaires provided for your expert input regarding prospecting best practices. This electronic survey will require approximately 15-20 minutes to complete. The mode of operation for this survey is remote, anonymous, and computerized. THIS IS NOT AN EVALUATION ACTIVITY. NO SURVEY WILL BE CONNECTED TO A RECRUITER.

Directions: Please write as detailed an answer as possible in the text boxes. Explain how you would implement the identified prospecting best practices, as most important in Round II, when targeting 17-24 year olds. Clarifications of terms used within the questionnaire are explained so please read carefully. Please do not include personally identifiable information (PII) or operationally sensitive information. It is important to this best practice research that everyone participates in every question. All answers matter! Please submit within one week of receipt of the survey.

There are 7 questions in this survey

Implementing of Planning Practices into the Four Modes of Prospecting
Definitions: Planning practices are prospecting systems that are developed with the intent to support, assist, grow, and promote prospecting (i.e., Mission Accomplishment Plan (MAP), Recruiting Operation Planning (ROP), Backwards Planning, Synchronization, etc.). “Simple Definition of propensity: a strong natural tendency to do something” (http://www.merriam-webster.com/dictionary/propensity, 2016).

1. Of the identified planning best practices selected as the highest consensus in Round II, explain how to implement propensity into telephone, virtual, face-to-face, and referral prospecting when targeting 17-24 year olds.

Please write your answer(s) here:

Describe implementing propensity planning into telephone prospecting.
Describe implementing propensity planning into virtual prospecting.
Describe implementing propensity planning into face-to-face prospecting.
Describe implementing propensity planning into referral prospecting.

Implementing Lead Sources into the Four Modes of Prospecting
Definition: Lead sources acquire principal contact resources that allow recruiters to have contact with prospects (i.e., high school lists, college lists, marketing leads list, future soldier generated leads, etc.).

2. Of the identified lead source best practices selected as the highest consensus provided in Round II, explain how to implement secondary schools (high
schools) and post-secondary schools (colleges) lists into telephone, virtual, face-to-face, and referral prospecting when targeting 17-24 year olds.

Please write your answer(s) here:

Describe implementing secondary and post-secondary school lists into telephone prospecting.
Describe implementing secondary and post-secondary school lists into virtual prospecting.
Describe implementing secondary and post-secondary schools lists into face-to-face prospecting.
Describe implementing secondary and post-secondary school lists into referral prospecting.

Implementing Rapport into the Four Modes of Prospecting
Definition: Rapport is a mutual understanding, trust, and agreement between you and the prospect (i.e., asking questions, use of humor, agreeing on common interests, listening, etc.).

3. Of the identified best practices to establish rapport provided in Round II, explain how to implement listening strategies into telephone, virtual, face-to-face, and referral prospecting when targeting 17-24 year olds.

Please write your answer(s) here:
Describe implementing listening strategies into telephone prospecting.
Describe implementing listening strategies into virtual prospecting.
Describe implementing listening strategies into face-to-face prospecting.
Describe implementing listening strategies into referral prospecting.

Implementing Goals/Needs/Interests into the Four Modes of Prospecting
Definition: Identifying goals/needs/interests is information gathering done in order to discuss the prospect’s essential objectives (i.e., active listening, open ended questions, scripts, etc.).

4. Of the identified goals/needs/interests best practices provided in Round II, describe implementing open ended fact-finding questions while telephone, virtual, face-to-face, and referral prospecting when targeting 17-24 year olds.

Please write your answer(s) here:
Describe implementing open ended fact-finding questions while telephone prospecting.
Describe implementing open ended fact-finding questions while virtual prospecting.
Describe implementing open ended fact-finding questions while face-to-face prospecting.
Describe implementing open ended fact-finding questions while referral prospecting.
Implementing Assumption into the Four Modes of Prospecting
Definition: Assumptions are beliefs or statements that are assumed to be true and from which conclusions are drawn (i.e., seek to understand, and follow on questions, restate the answer, etc.).

5. Of the identified assumptions best practice provided in Round II, describe implementing the skills of communicating the benefits of joining the Army to satisfy the prospect’s need into telephone virtual, face-to-face, and referral prospecting when targeting 17-24 year olds.

Please write your answer(s) here:

Describe implementing the skills of communicating the benefits of joining the Army to satisfy the prospect’s need in telephone prospecting.
Describe implementing the skills of communicating the benefits of joining the Army to satisfy the prospect’s need in virtual prospecting.
Describe implementing the skills of communicating the benefits of joining the Army to satisfy the prospect’s need in face-to-face prospecting.
Describe implementing the skills of communicating the benefits of joining the Army to satisfy the prospect’s need in referral prospecting.

Implementing a Commitment into the Four Modes of Prospecting
Definitions: Engendering a commitment produces obligation (i.e., identifying goals and passions, asking for an appointment, etc.). Closing is the best practice to engender a commitment (e.g., single-choice, two-choice, already enlisted, challenge, weighted)

6. Of the identified engendering a commitment best practice provided in Round II, describe the best practice for implementing a method of closing (e.g., single-choice, two-choice, already enlisted, challenge, weighted) into telephone virtual, face-to-face, and referral prospecting when targeting 17-24 year olds.

Please write your answer(s) here:

Describe how to select a method of closing in telephone prospecting to engender a commitment.
Describe how to select a method of closing in virtual prospecting to engender a commitment.
Describe how to select a method of closing in face-to-face prospecting to engender a commitment.
Describe how to select a method of closing in referral prospecting to engender a commitment.

Implementing Overcome Barriers into the Four Modes of Prospecting
Definitions: Barriers are obstacles, inefficiencies, or waste that prevents prospecting (i.e., poor training, no planning, no accountability, etc.). Sales methods are best practices to overcome barriers (i.e. Obviously, Re-stating of Just supposed (ORJ); feel, felt, found methods).

7. Of the identified overcoming barriers best practice identified in Round II, describe implementing sales methods (i.e. Obviously, Re-stating of Just supposed (ORJ), feel, felt, found methods) into telephone virtual, face-to-face, and referral prospecting when targeting 17-24 year olds.

Please write your answer(s) here:

Describe implementing sales methods to telephone prospecting.
Describe implementing sales methods to virtual prospecting.
Describe implementing sales methods to face-to-face prospecting.
Describe implementing sales methods to referral prospecting.

This concludes round III of three rounds. For more information contact the survey’s Principal Investigator: Jeremy E. McMullen, jeremy.e.mcmullen2.civ@mail.mil, Office: (559) 817-3143, Cell: (559) 410-1183. Submit your survey. Thank you for completing this survey.
Appendix M

Protecting Human Research Participants

Certification of Completion

The National Institutes of Health (NIH) Office of Extramural Research certifies that Jeremy McMullen successfully completed the NIH Web-based training course “Protecting Human Research Participants”.

Date of completion: 07/19/2014
Certification Number: 1506662