

Summary Report for Individual Task  
805K-79R-3002  
Conduct Prospecting Activities  
Status: Approved

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**Distribution Restriction:** Approved for public release; distribution is unlimited.

**Destruction Notice:** None

**Foreign Disclosure: FD5** - This product/publication has been reviewed by the product developers in coordination with the Fort Knox, KY 29207 foreign disclosure authority. This product is releasable to students from all requesting foreign countries without restrictions.

**Condition:** Your electronic planning guide indicates that you have scheduled prospecting activities. You have access to: USAREC Manual 3-01 The Recruiter Handbook, Recruiting Operation Plan (ROP), Market Intelligence Information, Recruiter Work Station (RWS), Recruiter Zone User Guide and applicable RPI/PPI. Required references can be accessed using the following link: <https://sites.google.com/a/goarmy.com/publications-library/home> Standard MOPP 4 conditions do not exist for this task. See the MOPP 4 statement for specific conditions.

**Standard:** Conduct prospecting activities IAW USAREC Manual 3-01, Chap 10 without error; identify qualified individuals willing to commit to an appointment to hear the Army Story.

**Special Condition:** None

**Safety Risk:** Low

**MOPP 4:** N/A

<b>Task Statements</b>
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**Cue:** None

<b>DANGER</b>
None

<b>WARNING</b>
None

<b>CAUTION</b>
None

**Remarks:** None

**Notes:** None

## Performance Steps

1. Conduct prospecting activities using the following prospecting techniques. Note: This task should be evaluated based on the technique being employed.
2. Conduct telephone prospecting.
  - a. Develop a precall plan.
    - (1) Define who it is you intend to contact.
    - (2) Filter List by specified parameters.
    - (3) Sort list by last contact.
  - b. Begin building trust and credibility.
    - (1) Introduce self with rank, name, and service.
    - (2) Use a scripted opening based upon blueprint information.
    - (3) Discover additional blueprint information.
    - (4) Correctly provide an Army Story and tie it into the reason for the contact.
  - c. State the reason for the contact.
    - (1) Establish to the lead that you are there to assist him/her.
    - (2) Apply an Army Story to this purpose.
  - d. Identify to the lead the need for a plan to achieve their goals.
    - (1) Discover a goal/passion.
    - (2) Determine the need to develop a goal.
  - e. Ask for appointment.
    - (1) Attempt to overcome obstacles.
    - (2) Respect and support the decision.
    - (3) Should the lead decline an appointment, attempt to include lead in the recruiter's network.
  - f. Execute the decision if the lead makes an appointment.
    - (1) Prequalify the lead.
    - (2) Establish a specific date, time, and place to conduct The Army Interview.
    - (3) Attempt to identify any influencers and include them in the interview.

(4) Determine if transportation is required.

g. Validate appointment.

(1) Restate the date, time, and location of the appointment.

(2) Obtain all contact information from the prospect and provide lead with recruiter contact information.

h. Ask for a referral.

3. Conduct face-to-face prospecting.

a. Prepare for face to face activities.

(1) Define who it is you intend to contact.

(2) Filter List by specified parameters.

(3) Sort list by last contact.

(4) Prepare market specific materials for handout (RPI's, PPI's, Posters).

(5) Gather Leads Cards RPI 954.

b. Begin building trust and credibility.

(1) Introduce self with rank, name, and service.

(2) Use a scripted opening based upon blueprint information.

(3) Discover additional blueprint information.

(4) Provide an Army Story.

c. State the reason for the contact. Inform the lead that you are there to assist him/her.

d. Identify to the lead the need for a plan to achieve their goals.

(1) Discover a goal/passion.

(2) Determine the need to develop a goal.

e. Ask for an appointment to conduct The Army Interview.

(1) Attempt to overcome obstacles.

(2) Respect and support the decision.

(3) Should the lead decline an appointment, attempt to include lead in the recruiter's network.

f. Execute the decision if the lead chooses to make an appointment

(1) Prequalify the lead.

(2) Set a specific date, time, and place to conduct The Army Interview.

(3) Identify any influencers and included them in the interview.

(4) Determine if transportation is required.

g. Ask for a Referral.

h. Validate Appointment.

(1) Restate the date, time, and location of the appointment.

(2) Provide the prospect with a business card.

4. Conduct Area-Canvassing (Add as note to develop a plan in conjunction with other activities).

a. Identify high traffic area and hot spots.

(1) Target strategic areas for advertising using Center Recruiting Operations Plan (ROP).

(a) Hang posters in area of operation.

(b) hand out and place RPI/PPI in area of operation.

(2) Analyze Market Intelligence Information.

b. Develop relationships with Centers of Influence (COI) and Very Important People (VIP).

c. Develop a battle-rhythm for Area-Canvassing.

(1) Identify specific times to visit locations within the Center's footprint.

(2) Identify pre-determined locations within the Center's footprint.

(a) Local Businesses.

(b) Strip Malls/Malls.

(c) Colleges and Universities.

(d) High Schools.

5. Conduct Virtual Prospecting.

a. Conduct email prospecting.

(1) Access Recruiter Zone.

- (2) Schedule campaign from "people" tab.
- (3) Select email and click next.
- (4) Choose applicable criteria and click find.
- (5) Select leads from list and click next. Note: A maximum of 100 emails can be generated at one time.
- (6) Select template and add personal message.
- (7) Select finish

Note: Responses will come to the sender's assigned USAREC email account to either remove them from the email list or to agree to appointment with a recruiter.

b. Develop an Internet Prospecting Plan.

- (1) Define who it is you intend to contact.

- (a) Social Media Prospecting.

- \_1\_ Utilize Recruiter Zone to Identify Intended Contact.
    - \_2\_ Filter List by specified parameters.
    - \_3\_ Sort list by last contact.
    - \_4\_ Prepare market specific message utilizing blueprint information.

- (b) Began building trust and credibility.

- \_1\_ Introduced self with rank, name, and service.
    - \_2\_ Stated the reason for the contact.
    - \_3\_ Used a scripted opening based upon blueprint information.
    - \_4\_ Established to the lead that you are there to assist him/her.
    - \_5\_ Discovered additional blueprint information.

- (2) Virtual Community Prospecting (Craigslist, College Job Postings).

- (a) Prepare market specific message.
  - (b) Establish to the lead that you are there to assist him/her.
  - (c) Use a scripted opening based upon blueprint information.
  - (d) State the reason for the contact.
  - (e) Introduce self with rank, name, and service.

## 6. Update Leads Processing.

### a. Add Person (add lead).

- (1) Access Recruiter Zone.
- (2) Select People Tab.
- (3) Select Add Person.
- (4) Enter last name, first initial name and phone number ( first name is optional).
- (5) Enter Email address, zip code or social security number.
- (6) Select Go.

### b. Update Blueprint/ Prequal.

- (1) Enter the Date of Birth, Education level, Goals and Gender.
- (2) Select Prior Service only if prior military history.
  - (a) Enter Prior Service information if applicable.
  - (b) Enter Prior Service Supporting Documentation.
- (3) Select the Privacy Act block.
- (4) Enter the date Prequalification was Administered.
- (5) Complete remaining fields of the prequalification.
- (6) Choose the appropriate prequalification result.
- (7) Enter comments in Recruiter Remarks block.
- (8) Select the Save button.

### c. Update Person Info.

- (1) Enter Component Code.
- (2) Enter last name and first name.
- (3) Enter social security number.
- (4) Enter street, city, state, zip code and country.
- (5) Enter Citizenship Status.

- (6) Enter Race.
- (7) Enter Email information.
- (8) Select Primary Email (if more than one).
- (9) Select the Save button.

d. Select School Info.

- (1) Select Lookup School icon.
- (2) Select appropriate school search criteria.
- (3) Enter applicable information.
- (4) Select Filter icon.
- (5) Select School Name dropdown arrow.
- (6) Select School name.
- (7) Select OK icon.

e. Contact History.

- (1) Select Contact Type and choose appropriate Next Action (Appointment Initial, Follow up etc.).
- (2) If Appointment Initial is selected a pop up will ask for confirmation changing the lead to a prospect.
- (3) Select Contact Date and Contact Time.
- (4) Select Result dropdown arrow.
- (5) Select Contacted.
- (6) Enter Disposition Category.
- (7) Enter Disposition.
- (8) Enter Recruiter Remarks.
- (9) Select Add to Calendar.
- (10) Enter End Time.
- (11) Select Appointment location.
- (12) Enter Appointment Address (If station in selected the address will auto fill).
- (13) Enter Calendar or Reminder remarks.

(14) Select the Save Button.

(Asterisks indicates a leader performance step.)

**Evaluation Guidance:** Score the Soldier GO if all performance measures are passed (P). Score the Soldier NO GO if any performance measure is failed (F). If the Soldier scores NO GO, show the Soldier what was done wrong and how to do it correctly.

**Evaluation Preparation:** Assess this task by using the evaluation guide and/or administering the performance test Evaluation Guide.

<b>PERFORMANCE MEASURES</b>	<b>GO</b>	<b>NO-GO</b>	<b>N/A</b>
1. Conducted prospecting using the following prospecting techniques.			
2. Conducted telephone prospecting.			
a. Developed a precall plan.			
(1) Defined who it is you intend to contact.			
(2) Filtered List by specified parameters.			
(3) Sorted list by last contact.			
b. Established trust and credibility.			
(1) Introduced self with rank, name, and service.			
(2) Used a scripted opening based upon blueprint information.			
(3) Discovered additional blueprint information.			
(4) Correctly provided an Army Story and tied it into the reason for the contact.			
c. Stated the reason for the contact.			
(1) Established for the lead that you are there to assist him/her.			
(2) Applied an Army Story to this purpose.			
d. Identified to the lead the need for a plan to achieve their goals.			
(1) Discovered a goal/passion.			
(2) Determined the need to develop a goal.			
e. Asked for an Appointment.			
(1) Attempted to overcome obstacles.			
(2) Respected and supported the decision.			
(3) Should the lead decline an appointment, attempted to include lead in the recruiter's network.			
f. Executed the decision if the lead chooses to make an appointment.			
(1) Prequalified the lead.			
(2) Established a specific date, time, and place to conduct The Army Interview.			
(3) Attempted to identify any influencers and included them in the interview.			
(4) Determined if transportation is required.			
g. Validated appointment.			
(1) Restated the date, time, and location of the appointment.			
(2) Obtained all contact information from the prospect and provide prospect with recruiter contact information.			
h. Asked for a referral.			
3. Conducted face-to-face prospecting.			
a. Prepared for face to face activities.			
(1) Defined who it is you intend to contact.			
(2) Filtered List by specified parameters.			
(3) Sorted list by last contact.			
(4) Prepared market specific materials for handout (RPI's, PPI's, Posters).			
(5) Gathered Leads Cards RPI 954.			
b. Began building trust and credibility.			
(1) Introduced self with rank, name, and service.			
(2) Used a scripted opening based upon blueprint information.			
(3) Discovered additional blueprint information.			
(4) Provided an Army Story.			
c. Stated the reason for the contact; Informed the lead that you are there to assist him/her.			
d. Identified to the lead the need for a plan to achieve their goals.			
(1) Discovered a goal/passion.			
(2) Determined the need to develop a goal.			

e. Asked for an appointment to conduct The Army Interview.			
(1) Attempted to overcome obstacles.			
(2) Respected and supported the decision.			
(3) Should the lead decline an appointment, attempted to include lead in the recruiter's network.			
f. Executed the decision if the lead chooses to make an appointment.			
(1) Prequalified the lead.			
(2) Set a specific date, time, and place to conduct The Army Interview.			
(3) Identified any influencers and include them in the interview.			
(4) Determined if transportation is required.			
g. Asked for a Referral.			
h. Validated Appointment.			
(1) Restated the date, time, and location of the appointment.			
(2) Provided the lead with a business card.			
4. Conducted Area-Canvassing			
a. Identified high traffic area and hot spots.			
(1) Targeted strategic areas for advertising using Center Recruiting Operations Plan (ROP).			
(2) Hung posters in area of operation.			
(3) handed out or placed RPI/PPI in area of operation.			
b. Analyzed Market Intelligence Information.			
c. Developed relationships with Centers of Influence (COI) and Very Important People (VIP).			
d. Developed a battle-rhythm for Area-Canvassing.			
e. Identified specific times to visit locations within the Center's footprint.			
f. Identified pre-determined locations within the Center's footprint.			
(1) Local Businesses.			
(2) Strip Malls/Malls.			
(3) Colleges and Universities.			
(4) High Schools.			
5. Conducted Virtual Prospecting.			
a. Conducted email prospecting.			
(1) Accessed Recruiter Zone.			
(2) Scheduled campaign from "people" tab.			
(3) Selected email and click next.			
(4) Chose applicable criteria and click find.			
(5) Selected leads from list and click next.			
(6) Selected template and added personal message.			
(7) Selected finish Note: Responses will come to the sender's assigned USAREC email account to either remove them from the email list or to agree to appointment with a recruiter.			
b. Developed an Internet Prospecting Plan.			
(1) Defined who it is you intend to contact.			
(2) Prepared for Social Media Prospecting.			
(3) Utilized Recruiter Zone to Identify Intended Contact.			
(4) Filtered List by specified parameters.			
(5) Sorted list by last contact.			
(6) Prepared market specific message utilizing blueprint information.			
c. Began building trust and credibility.			
(1) Introduced self with rank, name, and service.			
(2) Stated the reason for the contact.			
(3) Used a scripted opening based upon blueprint information.			

(4) Established to the lead that you are there to assist him/her.			
(5) Discovered additional blueprint information.			
d. Prepared market specific message.			
(1) Introduced self with rank, name, and service.			
(2) Stated the reason for the contact.			
(3) Used a scripted opening based upon blueprint information.			
(4) Established to the lead that you are there to assist him/her.			
6. Updated Leads Processing.			
a. Added Person (added lead).			
(1) Accessed Recruiter Zone.			
(2) Selected People Tab.			
(3) Selected Add Person.			
(4) Entered last name, first initial name and phone number ( first name is optional).			
(5) Entered Email address, zip code or social security number.			
(6) Selected Go.			
b. Updated Blueprint/ Prequal.			
(1) Entered the Date of Birth, Education level, Goals and Gender.			
(2) Selected Prior Service only if prior military history.			
(a) Entered Prior Service information if applicable.			
(b) Entered Prior Service Supporting Documentation.			
(3) Selected the Privacy Act block.			
(4) Entered the date Prequalification was Administered.			
(5) Completed remaining fields of the prequalification.			
(6) Chose the appropriate prequalification result.			
(7) Entered comments in Recruiter Remarks block.			
(8) Selected the Save button.			
c. Updated Person Info.			
(1) Entered Component Code.			
(2) Entered last name and first name.			
(3) Entered social security number.			
(4) Entered street, city, state, zip code and country.			
(5) Entered Citizenship Status.			
(6) Entered Race.			
(7) Entered Email information.			
(8) Selected Primary Email (if more than one).			
(9) Selected the Save button.			
d. Selected School Info.			
(1) Selected Lookup School icon.			
(2) Selected appropriate school search criteria.			
(3) Entered applicable information.			
(4) Selected Filter icon.			
(5) Selected School Name dropdown arrow.			
(6) Selected School name.			
(7) Selected OK icon.			
e. Contact History.			
(1) Selected Contact Type and chose appropriate Next Action (Appointment Initial, Follow up etc.).			
(2) If Appointment Initial is selected a pop up will ask for confirmation changing the lead to a prospect.			
(3) Selected Contact Date and Contact Time.			
(4) Selected Result dropdown arrow.			

(5) Selected Contacted.			
(6) Entered Disposition Category.			
(7) Entered Disposition.			
(8) Entered Recruiter Remarks.			
(9) Selected Add to Calendar.			
(10) Entered End Time.			
(11) Selected Appointment location.			
(12) Entered Appointment Address (If station in selected the address will auto fill).			
(13) Entered Calendar or Reminder remarks.			
(14) Selected the Save Button.			

**Supporting Reference(s):**

Step Number	Reference ID	Reference Name	Required	Primary
	USAREC MANUAL 3-0	Recruiting Operations	Yes	No
	USAREC MANUAL 3-01	The Recruiter Handbook	Yes	Yes

**Environment:** Environmental protection is not just the law but the right thing to do. It is a continual process and starts with deliberate planning. Always be alert to ways to protect our environment during training and missions. In doing so, you will contribute to the sustainment of our training resources while protecting people and the environment from harmful effects. Refer to FM 3-34.5 Environmental Considerations and GTA 05-08-002 ENVIRONMENTAL-RELATED RISK ASSESSMENT. Environmental protection is not just the law but the right thing to do. It is a continual process and starts with deliberate planning. Always be alert to ways to protect our environment during training and missions. In doing so you will contribute to the sustainment of our training resources while protecting people and the environment from harmful effects.

**Safety:** In a training environment, leaders must perform a risk assessment in accordance with ATP 5-19, Risk Management. Leaders will complete the current Deliberate Risk Assessment Worksheet in accordance with the TRADOC Safety Officer during the planning and completion of each task and sub-task by assessing mission, enemy, terrain and weather, troops and support available-time available and civil considerations, (METT-TC). Note: During MOPP training, leaders must ensure personnel are monitored for potential heat injury. Local policies and procedures must be followed during times of increased heat category in order to avoid heat related injury. Consider the MOPP work/rest cycles and water replacement guidelines IAW FM 3-11.4, Multiservice Tactics, Techniques, and Procedures for Nuclear, Biological, and Chemical (NBC) Protection, FM 3-11.5, Multiservice Tactics, Techniques, and Procedures for Chemical, Biological, Radiological, and Nuclear Decontamination. "Everyone is responsible for safety. A thorough risk assessment must be completed prior to every mission or operation."

**Prerequisite Individual Tasks :** None

**Supporting Individual Tasks :** None

**Supported Individual Tasks :** None

**Supported Collective Tasks :** None