

Chapter 13

Create A New COI/VIP Record

13-1. General.

a. The COI/VIP screen will help you log individuals who provide you with referrals or have access to resources that help in your recruiting efforts.

b. The following steps will show you how to create a centers of influence (COI) record and a very important person (VIP) record:

- (1) Reason for COI or VIP record.
- (2) Record today's action.
- (3) Complete COI or VIP required information.



c. Your first task is to locate the COI/VIP screen. Click **COI/VIP** under **New** in the **File** menu.

13-2. Reason for COI/VIP record.

A COI is anyone in your market area that can influence someone making a decision to join the military, such as a hiring manager at a local store. A VIP is someone who can help in your recruiting efforts such as the town mayor. The mayor would be able to get you exposure by inviting you to participate in community events such as a parade. Think about the people you meet and try to distinguish between the two categories as to how you would enter their information.

The image shows a screenshot of the ARISS COI/VIP record form. The form includes fields for 'Action', 'Action Date', 'Time', and 'Result Cd'. Below these are fields for 'Title', 'Last Name', 'First Name', 'Middle Name', and 'Suffix'. There are also fields for 'Street', 'City', 'State', 'County', 'Zip', and 'Country'. Other fields include 'Digi Name', 'Email', 'Digi Web Address', 'Phone', 'Area Cd', 'Number', 'Ext', and 'Type'. A 'Background Summary' field is also present. At the bottom, there is a 'History' table with columns for 'Name', 'Rank', 'BGID', 'Action Cd', 'Action Dt', 'Time', 'Result Cd', 'Watch Cd', and 'Dt'. A 'Remarks' field is located below the history table. At the very bottom, there is a 'Next Action' section with 'Action', '# Days to Next Action', 'Action Date', 'Time', and a 'Save to Outlook' checkbox.

✓ This is another screen that the **Save to Outlook** box was added. Anytime that you record an **Action** or **Next Action**, check this box and let it update your MS Outlook calendar.

13-3. Record today's action.

a. The information you need to enter for each of the categories is exactly the same, although you want to be sure to place each person into the right area so when you run a report you get the information you are looking for.

b. First select an **Action** that represents the contact you are having with the individual today. Let's take a look at some of the options.

The image shows a close-up of the 'Action' dropdown menu in the ARISS software. The 'APPOINTMENT' option is selected and highlighted in blue. The 'Action Date' is set to '20010714' and the 'Time' is set to '00:00'.

Click the **Action** drop-down arrow. You met with the individual, so click **APPOINTMENT**. Notice that the **Action Date** is filled when you initially opened the record and is now subdued. You cannot change this date, but you must enter the **Time** the appointment took place.

USAREC Pam 601-32

c. Now you need to enter the results of your appointment. Begin by clicking the **Result Cd** drop-down arrow. Remember the options that you get for

a **Result Cd** are directly related to the information that you entered for an **Action**. You conducted an appointment so go ahead and click **CONDUCTED**. In the **Remark** section summarize the details of your appointment.

13-4. Complete COI/VIP required information.

a. Now you need to provide information regarding whom you had your appointment with. The information required here is fairly standard and will be an excellent reference for you in the future. During your conversation with Mr. Jackson, he provided you with a great deal of information on his background. It is important to take “mental notes” of these pieces of information because they can come in handy during future conversations. The fact that he was the Principal at Shaker HS could mean that he knows other people that he would be willing to introduce you to. Mr. Jackson is also an Army veteran and active in his local Veterans of Foreign Wars. He is a great contact for you to have and is in a position where he definitely is a COI and you want to ensure you keep in contact with him. So let’s schedule a **Next Action**.

b. Click the **Action** drop-down arrow. Let’s set up a time to telephone Mr. Jackson next week. Click the **Action** scroll bar down-arrow and select **TELEPHONE CALL**.

You need to become familiar with the other action items listed. The application will default the **Action Date** to today’s date; however, you may change this date to accommodate your scheduling. Now you’ll need to select a **Time** for the telephone call. Click the **Tab** key on your computer keyboard to move from the **Action Date** to the **Time** window. When you hit your **Tab** key to enter a time, the system automatically inserts the **# Days to Next Action** for you.

✓ If you start checking the **Save to Outlook** box, you will find that your electronic mandex will be a better tool for managing your time and easier to maintain.

c. All that is left is to save this information. Click **File** on the menu bar and click **Save** or you can just click on the **Save** icon.

d. Notice now that you have saved your information, you can see it in the contact **History** for your COI or VIP.

| Name | Rank | RSID | Action Cd | Action Dt | Time | Result Cd | Next Act Cd | Dt |
|-------------|------|------|-----------|-----------|-------|-----------|-------------|----------|
| Mr. Jackson | SGS | 1A5T | AP | 20070714 | 17:49 | C | TC | 20070721 |

e. Now close the record by clicking on **File** on the menu bar and finally, click **Close Record**. You will notice that when you open the **Find** screen the action you scheduled for Mr. Jackson will show under scheduled activities.



f. You will want to continue entering any COIs or VIPs that you encounter during daily prospecting. They will be a great source for leads and can be an influence for those that you may be having a hard time selling.