

## Disgruntled Directors' Change Paradox: A Teaching Case

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### ABSTRACT

Using case studies in the management classroom can be a highly effective teaching method. Cases intentionally connect practical and theoretical concepts (Nohria, 2021) and provide unique and diverse classroom learning (Sulé et al., 2023). Student-written cases are low-cost, high-impact, relevant ways to deeply engage learners (O'Brien & Pennock, 2023). This manuscript is a student-written teaching case study based on a leadership and role change incident at the Athletic Recruiting Company\* (ARC). These changes were highly disruptive and contributed to serious employee disengagement problems. This case study offers students the opportunity to identify issues, develop critical thinking skills, discuss strategies, apply theories and develop viable alternatives, as well as learn best practices in change management interventions with a real problem, organization, and vetted solution. This manuscript includes an academic rationale, case study, pragmatic and theoretical discussion questions and responses, teaching notes, and a student mini-case assignment description.

### KEYWORDS

*Change, change management, resistance to change, human resources*

### Acknowledgements

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*Please note that organization and employee names have been modified for the purposes of this case.*

### Introduction

Organizational changes are constant. This teaching case explores disruptive leadership and role modification at the Athletic Recruiting Company (ARC) following a competitor acquisition. Unfortunately, few organizations are successful in making changes with most experiencing challenges in their implementation (Kotter, 2009). Shulga (2021) found positive effects in organizational change when leadership engages with the workforce in the initiation phase of implementing change. There are many studies on best practices of initiating and implementing change management (Hagel et al., 2024) and students benefit from learning from real-world business dilemmas (Nohria, 2021).

The case study was part of a student-written teaching case study assignment administered in a MBA course, Organizational Development and Change (see Appendix A). The suggested use of this case study is during in-person class discussions, but it could easily be adapted for hybrid or online formats. In small groups, students practice critical thinking, problem-solving and collaboration skills. Case studies encourage students to experiment and test their own decision-making ideas. In a recent study by Sulé et al. (2023) found that case

study group work provided students with unique and diverse perspectives from their classmates resulting in enhanced educational experiences.

Harvard Business School introduced *General Shoe Company*, the first published case study for academia, in 1921 (HBP Editors, 2021). With rapid ever-changing business conditions, business school educators use cases to provide students with the opportunity to solve real-world business problems (Nohria, 2021). Cases allow educators to bridge the gap between textbook concepts and real business situations to apply theories (Nohria, 2021). Students retain business concepts better while practicing and exhibiting critical thinking and decision-making skills (Nohria, 2021), which are essential in fostering an aptitude for effective leadership and management characteristics. Other benefits of using case studies in leadership and management are increased engagement and focus on the essentials of a business problem, learning personal bias, practice in defending the student's judgement, collaboration and deliberation in group settings, and improved self-confidence with practice (Nohria, 2021).

In this case study, students are exposed to common leadership and change management challenges. The organization is going through ownership and leadership changes along with a drastic job description modification within the sales department. A top insight of great business leadership during the times of change discovered by Kong and Rhoads (2024) is leaders need to exhibit respect to the roles of their teams so that the members of the team retain their dignity when change is needed. In reviewing this case, one of the issues that develops with the ARC director team is they feel that leadership did not respect them or their roles, and they lost their dignity with the changes. A key insight found by Kong and Rhoads (2024) was that team members are motivated by an award that is achievable. This may be an important part of the student case discussion and evaluation of the business problem. In short, students benefit from discussions with classmates in the exchange of views, experiences, and overall discussion (Toogood, 2023).

## Background

The Athletic Recruiting Company (ARC) was athlete-founded in the early 2000's, as a for-profit organization whose primary mission is to assist high school student-athletes gain exposure to college coaches. Initially employing over 750 coaches, scouts and former college athletes, ARC educates students on the college recruiting process. The company is well-known as a leader in college athletic recruiting by bridging the gap between high school student-athletes and college coaches' recruiting needs. ARC's specialized technology and recruiting expertise helps athletes tap into the vast network of collegiate coaches. ARC has grown from 750 employees to more than 3000 employees and also provides mental health, nutrition, and sports development along with recruiting assistance.

In 2022, ARC was acquired by a private equity firm and became publicly traded. The company mission and vision remain unchanged but financial accountability increased. ACR changed from GAAP (Generally Accepted Accounting Principles which focuses on net income) to EBITDA (Earnings Before Interest, Taxes, Depreciation, and Amortization which adjusts the income) accounting practices. ACR became vigilant in exceeding overall company goals. They became more stringent with budget oversight and capitalizing on effective human capital output. This change put all departments under a cost management microscope. Profits and losses were scrutinized but added attention was given to the high school division spending. Executive management decided to change the division's leadership. The current manager, Timmy, was demoted, and all employees of the high school division, including the former demoted manager, now reported to the Vice-president of Partner Programs. This new position was held by a former coworker from the same division, Shane, who was also much younger (by decades) and had less experience than most of the team.

The four high school division Directors had more than 30 years of combined experience with the company. They experienced several different iterations of their job during this time; however, they had always reported to Timmy. He represented security and instilled trust and confidence in the Directors. Executive leadership also decided to alter the job description and responsibilities of the high school recruiting Director positions.

Shane joined the company at a pivotal time in ARC's transitional period. She started a month before the start of the COVID-19 pandemic. Her hiring was intended to bring a fresh perspective to the stagnant position. Shane's ambition and relentless nature to improve the efficiencies of the role and overall department were obvious. Shane was successful as a student-athlete. She was a proven mentor, with an extensive record of

advising high-level athletes at a variety of colleges and universities. Shane was an innovator and notable expert in the ever-changing landscape of athletics and business operations.

## Implementing the Change

The Vice-President of Partner Programs, Shane, was notified by her supervisor, Amy, that the high school division Director roles would be going through a “facelift.” These jobs would no longer be on the road six days a week, scheduling back-to-back high school presentations, educating families on the recruiting process, and flying from state to state to meet with Athletic Administrators. They would be grounded, limited travel, except for attending partner camps, athletic combines, and showcases on specific weekends scheduled by the Event Partnership Directors. Shane knew the change would be devastating to current employees. However, the Directors would be receiving a higher base salary with the opportunity to earn a commission.

Shane was tasked with creating new Director of Regional Education job descriptions (see Appendix B and C) and instructed to meet with the Directors regarding the new and improved position. Employees who did not want the new, travel-restricted, position had the option of becoming a 1099 contractor. Shane sent a meeting invite to each Director for a one-on-one meeting to discuss the imminent role change and let them know about an upcoming team meeting on the topic. She thought the conversations had gone smoothly. There were only a few questions and indistinct head nods.

Following the one-on-one meetings, Shane and Amy engaged Peter, Director of Recruiting Education, to prepare for a forum meeting that included themselves and the four Directors. In Figure 1 is an email correspondence between Shane and Peter as a follow-up to their preparation for the meeting with the Directors:

*Hi Peter,*

*Thank you for taking the time to connect with Amy and I earlier today. As mentioned, I wanted to share the new “Director of Regional Education” job overview for you to review at your convenience.*

*Since it will be our intention to discuss this new role with the broader group during next Tuesday’s weekly stand up meeting, we would ask that you keep this information confidential. Amy and I will plan to schedule a follow-up call with you to further discuss this role and the transitions we are making in the High School space.*

*I know a lot of information was covered during our short meeting so please don’t hesitate to reach out if you have any lingering questions or concerns between now and next week.*

*We appreciate your willingness to always be a vocal leader and someone who goes the extra mile to ensure a family’s experience is invaluable. I look forward to working with you more closely. Have a phenomenal rest of your day!*

*Shane*

Figure 1. Email Subject: Director of Recruiting Education - Conversation Follow-up

Shane expected the meeting to be a formality, however, unexpectedly the Directors expressed concerns and frustrations. Employee questions were reasonable, and the emotion around the change was appropriate. However, they were unhappy, confused, and felt targeted. Having been the external face of the company, representing ARC at a multitude of events, and at times the main reason clients maintained their memberships with the company, they couldn’t fathom the idea that the job, and ultimately their entire identity, was being re-classified. This change was difficult to accept.

Begrudgingly, all Directors accepted the new position, but it was not without ongoing concerns, complaints, and challenges. Over the next 3 months, as they settled into the new normal, they blatantly disregarded email communications, were late to meetings, and behaved disengaged unless specifically asked. It was becoming overtly obvious; they were rebelling.

**Lingering questions after the meetings:**

- ▶ Expense reimbursement for non-partner/high school events.
- ▶ Monthly budget for Directors to execute HS/non-partner events
- ▶ How do we address inquiries from HS coaches/admin who'd like us to travel and present to their audience

**Case Teaching Instructor Notes**

This 2-page teaching case study presents a real-world scenario resulting from an acquisition, reorganization, and job structure change. Students review the situation, identify the main issues, and suggest a change management plan with an emphasis on employee engagement, turnover, communication, and cost reduction.

**Teaching Objectives and Target Audience**

- **Objective:** Students will be able to identify human resource and organization problems. Students will be able to develop a change management solution to manage an organizational change initiative.
- **Target audience:** This case has been used in a graduate change management course but could also be effective in graduate or undergraduate leadership, sales management or human resources courses. Student assignments could also be used for Assurance of Learning (AoL) plans.

**Teaching Approach and Strategy**

Students should read the case and Kotter (1995 or 2007) article before class.

This case works well with initiating a discussion about *at-will* employment, adapting to change, and workplace expectations. The following discussion prompts could be used to introduce these topics:

- Discuss a workplace change you resisted.
- Discuss a time your job was significantly altered with little or no notice.

Answers will vary. Discussion can then be transitioned to the case example.

**Functional Case Questions**

There are two main questions; dealing with the main issues and how to improve the approach.

**Question: What are the main issues at ARC?**

**Question: What would have been a better approach for enacting the changes at ARC?**

There are many areas that poised sources of ARC's issues below:

- **Organization:** Resistance to change and employee engagement
- **Directors:** job identity, leadership trust, compensation, autonomy, job structure.
- **Vice-President Partner Programs:** Low employee morale, subordinate mistrust, age/gender/company tenure/race differences between Directors and VP, and cost containment

Shane did not create any of the issues but was responsible for delivering bad news and operationalizing the changes. At the direction of executive leadership, she gave employees an ultimatum. They chose to stay with the organization in the new roles, but the contractor option created an adversarial situation. One option would have been to put all the Directors on Performance Improvement Plans, a step towards terminating their employment. But this too would likely yield negative outcomes with morale and turnover. Shane was new to her role, and not trusted by the Directors.

**Theoretical Case Questions**

Another approach to conducting the case with the students is to discuss which, if any, of Kotter's (2009) eight errors were most apparent in the case. Further discussion could be held on what could have been done to reduce the error.

**Error 1: Not establishing a great enough sense of urgency**

Clarity in why reducing expenses was the main aim of the change would have supported the urgency effort. Looking at industry benchmarks and ROI of the travel related to high school Directors would have framed the change to remain competitive. When Shane did not know the answer to an employee's question, she would

delay her response and check with her supervisor. This undercuts the sense of urgency and creates the impression that Shane doesn't have the authority to manage the Directors.

***Error 2: Not creating a powerful enough guiding coalition***

Shane could have leveraged executive leadership and human resources to establish a united front. Not included in the case summary, Shane included the employee development manager once she realized there were problems, which was a great idea. Creating a plan with employee development endorsed by executive leadership could minimize this error in some organizations. Shane's supervisor offered to be the protagonist in the change, but a better option is to be a united front.

***Error 3: Lacking a vision***

Establishing measures to reward cost savings and asking all employees to suggest ideas to improve the balance sheet would establish a vision and reduce the targeted feeling among the Directors. The Directors all had high professional identity with their jobs and organizations. They were very upset with the loss of job autonomy, restricted travel, and intrusive oversight. Creating a system for approving travel, and meeting schedules that is clear and transparent would support the change.

***Error 4: Under communicating the vision by a factor of ten***

Shane and other leaders need to be accountable for cost-cutting, reducing travel, and non-value-added expenses to build trust and share the pain. In hindsight, Shane used a one-size-fits-all solution but should have modified her response to fit each Director. Directors who are pragmatic needed details on the compensation increases and bonus structure. While emotive Directors would have responded to the work-life-balance changes and more time with their families. Having a variety of ways to explain the changes to resonate with differing employee motivations would have improved the outcomes. Creating a FAQ document that addresses the needs of both rational and emotional employees would have customized and supported the leadership response.

***Error 5: Not removing obstacles to the new vision***

Continually looking for new ways to improve the organization's financials is a great goal, but Shane was responsible for rewriting job descriptions that she did not fully understand. Asking the Directors to be involved in the job description rewrites would have helped Shane understand the jobs and changes before they were enacted.

***Error 8: No anchoring changes in the corporation's culture***

The changes did not happen to everyone, just the Directors in the high school division. Added transparency on other changes that were a result of the acquisition, accounting processes, drop in business due to COVID-19, and leadership expectations would have been helpful.

This teaching case study can also be used to discuss issues for first-time managers, sales managers, and corporate life cycles moving from entrepreneurial to professionally managed.

## **Concluding: Case Ending Options**

After discussions and questions, optional endings might be covered with the students. One potential ending is listed here.

Once the situation had already escalated, Shane, consulted with Anthony, Learning and Organizational Development Manager, and a *Change Management Conversation* was initiated between the OD Manager and Directors. In Figure 2 is an email exchanged between Anthony and Shane.

*Hi Anthony,*

*Happy Wednesday! I feel like it's been a while since we've connected and hope you are doing abundantly well! A month ago we shifted and re-vamped the role of the Directors of Regional Recruiting to Directors of Recruiting Education and have asked them to shift their focus from consistently being out in the field to creating intentional strategies that lead to more meaningful engagements either virtually or in a more concentrated space.*

*In this shift, we've found that these teammates have struggled within that transition and rightfully so. After reflecting on the phenomenal job and presentation you did in November with the Partner Programs staff, I was wondering if you'd be interested in doing something similar. A lot of what I'm noticing from these teammates is the "uncertainty of the ambiguity" and how they take control of that and create action and synergies. It would be great to have a presentation on a topic that is reflective of "things are changing... how do I fit in?" or something of that nature.*

*I'm sure it would be easier to hop on a quick call to discuss it so please let me know if you're okay with me looking at your calendar and scheduling some time.*

*Thanks in advance for your consideration!*

*Shane*

Figure 2: Email Subject: Professional/Personal Development Presentation for the Director of Recruiting Education Team

Meetings took place between the Directors and Anthony. Shane was not present. This was a good solution that gave the Directors some anonymity with their angst. This conversation brought clarity to the Director's concerns—they didn't feel valued, were unclear about the new role responsibilities, and were upset about losing their decision-making autonomy.

Knowing this, Shane could now take steps to dialogue with the Directors about how to better meet their needs. Monthly *pulse* meetings were initiated for employees to share issues and for management to check employee satisfaction. Directors' attitudes quickly improved. They felt more empowered, communication returned, and employee engagement increased.

Moving forward, Shane focused on meeting employees' basic needs, being a supportive leader, and encouraging teamwork. She specifically, focused on making sure that the Directors understood their job expectations and had the materials/equipment to do their work. She also spent time showing that she was a supportive leader by recognizing good work, demonstrating care, and encouraging employee training and development while also soliciting and listening to Directors' opinions.

### Additional Readings and Discussion

Managing change is important but difficult. Exposing students to a variety of proven frameworks can begin deeper conversations about planned and unplanned change.

This case could also be a stepping off point for class discussions on disgruntled employees, first time manager concerns, and motivating sales teams. Disgruntled employees can negatively impact individuals and derail leadership initiatives. Class discussion question could include the following:

***How would you handle the director's negativity?***

***How can you address an employee who intentionally misses meetings?***

***What would a discussion with an employee about their attitude include?***

First time managers face many new challenges. Moving from individual contributor to leader can often involve unexpected learning, problems, and rewards. The skills needed to be successful in their new responsibilities, build an effective team, and develop leadership skills can be daunting. Some questions for class discussion could be the following:

***What strengths do you have that would make you a good leader?***

***What skills would you recommend Shane develop to increase her effectiveness?***

***How can a new manager like Shane build trust with her team?***

***How can you informally get feedback from your team?***

Sales teams can be particularly challenging to lead. It requires a balance of strategic planning, communication, motivational and ongoing support.

***What rewards program should Shane implement?***

***What data would be used for reward decisions?***

***How can Shane reward teamwork and collaboration?***

## Final Thoughts

Typically when using this case with students, the majority are surprised by the demotion and extensive job structure change. It is helpful to recognize that students will have differing perspectives. The important point is to identify different main issues and align the varied solutions to the issues identified.

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## Appendix A

### Student Mini-Case Writing Assignment Description

Management is messy! The aim of this assignment is to add diverse discussion and analysis opportunities to the class.

You will write a short original case, based on personal experience, and facilitate a discussion with classmates. This assignment will analyze situations relevant to you from your lens and experiences intended to broaden your experiences by applying peer, class, and theoretical thinking and reflection.

Write a one-page, single-spaced (maximum) narrative of something that went wrong (or failed). Post this summary to the LMS class discussion by noon the day before your case class discussion facilitation assignment. The chronicle should include:

1. The organization involved,
2. The challenge facing the organization, employee, manager, or leader
3. Your role,
4. Significant stakeholders,
5. Actions taken, and
6. 3-4 rich discussion questions

During class, you will present a 2-3 minute case summary, answer classmates' clarifying questions, then facilitate a small group discussion, and debrief the discussions with the whole class.

### Tips for Writing a Good Business Case Study

In general, a good case wrestles with a relevant, important, professional/personal issue. They have a personal touch and solutions appear murky. They are detailed enough to address the problem, but are not information heavy or confusing. There is a decision point, cliff, controversy or point of suspense. A good case is well structured, and easy to read.

Issue or incident choice is very important! Choose a situation that is personally relevant, interesting and significant enough to have a deep class discussion. Additional reading:

*O'Brien, T. & Pennock, A. (2023). When Students Are the Case Protagonists: The Value of Using Cases Based on Your Students' Lived Experience. <https://hbsp.harvard.edu/inspiring-minds/when-students-are-the-case-protagonists>*



## Appendix B

### Initial Job Description

#### **Director of Regional Recruiting & Team Solutions**

**Job Details:** Director of Regional Recruiting & Team Solutions will leverage B2B selling strategies to develop holistic relationships with high school, club and travel programs using Team Edition as a foundational technology. By proactively responding to the recruiting needs of club and high school coaches from a regional recruiting territory, director will connect thousands of student-athletes and families every year to the ARC athletic recruiting network. Presenting college recruiting education will also be a valuable opportunity for director to create memorable experiences for every student-athlete and family that engages with ARC.

**Expectations:** Director is primarily responsible for developing holistic relationships with high school, club and travel programs using Team Edition as a foundational technology.

Presenting Team Edition to coaches at Club Teams and High Schools in the following ways:

- Virtual Meetings/Demos
- Email campaigns
- Webinars
- Host ARC recruiting education events
- Other meetings as needed at the discretion of the employee
- Generate Premium ARC SaaS Team Edition Contracts with Clubs and High School
- Generating leads from Virtual Meetings/Demos with coaches
- Generating leads from events
- Attend Coach Conferences
- Attend Partner Events

#### **Responsibilities**

- Must meet all training and messaging expectations when representing ARC
- Become proficient with the ARC Team Edition platform
- Become proficient with Salesforce Lightning
- The ability to work remotely and meet virtually via phone and video conferencing
- Demo Team Edition for coaches to build and nurture relationships with programs Explore various ways to use Team Edition to expand our network and create new opportunities
- Develop a network of relationships with high school, club, and travel programs in your region
- Attend weekly team and 1 on 1 meetings to grow within the role and stay current with new initiatives
- Experience in public speaking and use of PowerPoint during live educational sessions
- Integrating technology on-site at high school, club, and partner events
- Adhere to the ARC Core Values at ALL times
- Work in a fun, sports-oriented team culture
- Enjoy a competitive sales environment that will push you

## Appendix C

### Revised Job Description

#### Directors of Recruiting Education

The following proposed changes to the Director of Regional Recruiting & Team Solutions role will more appropriately align with their role as educators and brand ambassadors. Engagement surveys and the evolution of the position have provided a clear path to redefine the Director's job description and compensation package.

**Title Change:** Director of Recruiting Education

**Current Position:** Directors of Regional Recruiting

**Reason:** Education is primary, based on feedback.

**Base Salary:** \$80,000.00

**Discretionary Bonus:** 20% of base (\$16,000 max potential earnings)

#### Bonus Details:

- Bonus paid the following year after current year end which aligns with ARC operational roles on Endeavors schedule. This typically occurs in March or April.
- Bonus is 20% of employee's base salary and final earning will be determined by performance metrics, employee engagement and other deliverables evaluated by direct manager.
- While not expected, final bonus earning totals are at the sole discretion of Endeavor based on ARC EBITDA and calendar earnings.

#### Role Expectations:

- A determined number of events will be required annually of this position at the discretion of the EVP of Partner Programs; to include both physical and virtual Partner and High School/Non-partner events that may require travel. (All pre-, during and post event tasks and responsibilities will need to be completed and all processes adhered to).
- Manage, with direct assistance of the VP of Partner Programs, HS State Partnership relationships and event opportunities.
- Generate leads from virtual meetings/events with coaches, parents and athlete and be available for scheduled follow-up meetings with interested families.
- Assist in increasing NPS scoring outcomes and improving overall customer satisfaction by working with families to determine their overall recruiting needs.
- Develop a network of relationships with high school, club, and travel programs in your region.
- Collaborate on ARC's marketing and social media strategy as necessary.
- Attend Coach Conferences as necessary.
- Attend weekly team and 1 on 1 meetings to stay current with new initiatives.
- Attend weekly Recruiting Specialist - Recruiting Force calls for continued training and expertise on ARC College Recruiting services and resources

#### Notable Adjustments:

- This role will no longer have a monthly sales bonus incentive or contests.
- There will be no per enrollment fees in this compensation plan.
- Commission may still be earned at 12% for any enrollments handled directly by the DORE themselves.
- High school, non-partner events and conventions will be at the final approval of the VP of Partner Programs. We will be moving away from individual bookings.