



## Boehly Center “Prepared for Success Career Preparation”

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## I. Overview

This guide is to serve as just that, a guide. Before we get started with our tips and recommendations, there are numerous resources at William & Mary to provide additional suggestions and guidance to undergraduate students seeking career advice on a variety of scenarios. We highly encourage you to review all tips and take everything into consideration before pursuing next steps. Throughout this guide, you will find links to additional resources, including resources from the Cohen Career Center and Graduate Career Management Center (GCMC).

In the following guide, when “corporate” is referenced, it is all encompassing for industries (corporate, non-profit, gov’t, education, etc.).

**Please note: The following guide is provided by the Boehly Center for Excellence in Finance. This guide is based on recommendations from Boehly Center staff and items suggested are not a requirement.**

The items in the following guide are to serve as things to consider if you find yourself in these scenarios.

If you find yourself wanting to talk to someone about these scenarios or other scenarios, we are here to help. Feel free to contact Melanie or Morgan with the Boehly Center or the Cohen Career Center for more information.



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### **Contact Melanie About:**

- Academic Advising
- Career Prep
- Club Advising
- Mentor Program
- Special Topic Courses



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### **Contact Morgan About:**

- Alumni/External Connections
- Career-Readiness
- Speakers
- Strategic Relationships

In addition, here are some quick support pages from Cohen to get you started:

- Professional Ethics & Etiquette: <https://www.wm.edu/offices/career/students/job-and-internship-search/job-search/ethics-and-etiquette/index.php>
- Making the most of Career Fairs: <https://www.wm.edu/offices/career/students/job-and-internship-search/job-search/career-fairs/index.php>
- Job Searching: <https://www.wm.edu/offices/career/students/job-and-internship-search/job-search/index.php>

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## II. Creating Strong(er) Alumni/Employer Emails

Constructing a strong email does not need to be hard, but it needs to be intentional and well prepared. Know your target audience and purpose. To whom are you writing? What is their role? What do you hope to accomplish from reaching out? What do you think the recipient will do after receiving it? If you know these answers, you are off to a great start! Think how often you have received an email or a text and you think, “Did they re-read this?” or “Ooooo auto-correct strikes again!” That is not what you want an alumnus or employer to think because it automatically puts you into a “bucket”. Whatever “bucket” that is, it is not the “I am going to hire” bucket. Like when you are meeting someone for the first time, an email is a first impression.

Like everything you will find in this guide, these are not requirements, merely suggestions and best practices that we have witnessed first-hand or through our professional experiences.

**Below are 8 tips to help you get started on creating strong(er) emails.**

- 1. Identify purpose.** Determine the reason(s) for the email/outreach. Be prepared to articulate the purpose whether it is to review an attachment (be ready to explain what attachment is) or if it’s for career advice (be ready to summarize goal), etc.
- 2. Know your audience.** Imagine writing an email to President Rowe and asking her how to run a financial model. Sure, she may know how to do it or she could get you to the right people who can help you, but probably not the right audience to ask that question. So, are you reaching out to an alumnus, employer, family friend, faculty member, classmate, mentor, etc.? Depending on the answer, it will likely adjust how you approach your email.
- 3. Time is short.** Everyone is busy, including you! Your audience may have even less time to read, process and respond to your email. So mastering the art of being concise is imperative.
- 4. Avoid slang and short-hand.** Yes, this may seem counter-productive to the above item on being concise, but being concise does not mean losing your professional approach. Even if the individual responds in a more casual way, they get that luxury, you do not. When in doubt, stay professional.
- 5. Specific subject.** Remember they will likely only see the first 3-5 words so you still need to be concise and to the point (but remain professional). If it’s to an alumnus/a using “W&M” somewhere will not hurt you (ex: W&M Student Connection/Support). If it’s about a specific job application to an employer, consider using your first initial, last name in the subject so you pull easily if they are trying to find you (ex: M. Hutter Financial Analyst Application or Follow-Up: M. Hutter Application).
- 6. Follow the format.** Writing an email is no different from a paper really. You have an overview (email greeting), body (email purpose/request), conclusion (email ‘ask’/request) and footnotes (email signature).
- 7. Attachments.** If you are attaching something (resume, application, etc.) make sure that you have attached it! We have all been there when you are the one who forgot to attach or the one

receiving now a second email with just an attachment. Don't be that person, just check it the first time. Similarly, if you are including hyperlinks or web links, make sure they work!

- 8. Proofread 2x.** Double check for spelling mistakes or auto-correct related typos. You may only have one chance to earn a response, so make the reach-out professional and accurate. Then hit send!

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### III. Initiating Conversation/Networking with Alumni

Alumni were once in your shoes. They remember the anxiety, stress, confusion and doubt that comes from initiating a conversation with a company or alumnus/a. Networking is like anything that you will do, the more you do it, the more comfortable it will become. Remember when you were a child and you had to jump into the deep end of the pool for the first time or it was time to take those training wheels off? The key to accomplishing these things was taking the first step. Then, it became easier and easier. It's no different with networking or reaching out to employers and/or alumni! And, alumni especially are very forgiving and want to help, in fact, many enjoy hearing from students. They love it!

**Below are 15 tips that may help initiating the conversation.** In addition, click [here](#) and [here](#) to see additional suggestions and sample networking questions from the Cohen Career Center.

1. **Start ASAP.** It takes time to build a network and you want to have it lined up before you actually "need it".
2. **Do your research.** Thanks to social media, most contacts can be found on LinkedIn or a company website. Find some similarities or talking points that help break the ice.
3. **Plan.** Have a good understanding of what you hope to obtain from the conversation before you reach out and have the conversation. It is strongly encouraged that you write your questions in advance.
4. **Double-check everything.** If you are using a template, make sure you have changed the name(s) and company information. Double check for spelling mistakes or auto-correct related typos. You may only have one chance to receive a response, so make the reach-out professional and accurate.
5. **Be specific.** Alumni are busy and are more likely to respond in a timely fashion if there is a specific request or deadline. These tend to get a quicker response than "tell me how you got to where you are." That conversation is helpful too, but build to it.
6. **Polite persistence.** Alumni are busy, so if you do not hear from them within 10-14 days, feel free to follow up politely. Similarly, if you do hear from them and they say "this is a bad time but please follow up next week." Follow up next week! They mean it, and too frequently alumni share that students do not follow up which may imply insincerity, lack of organization, or disinterest.
7. **Prepare for a VM.** If you are calling the alumnus/a, be prepared to reach their voicemail. Have your remarks prepared in advance so you are not caught off guard. Be sure to articulate clearly and be concise. State your name slowly and clearly (can spell it if needed) and share your return phone number slowly and clearly and even consider repeating your phone number. Our friends at the Graduate Career Management Center suggest: briefly introduce yourself, share how you received their name, why you are calling, remind them of your prior conversation/appointment (if applicable), share that you hope to only take 20-30 minutes of their time, and end the call positively and with a thank you. Note, if you reach an administrative assistant, the same rules apply in the message you hope they will relay.

- 8. Dress the part.** The old saying that you never get a second chance to make a first impression strikes again! Alumni already have a job and can be more casual in appearance or dialogue but you cannot be. Dress like you are on an interview (business professional). In addition, be aware of your body language and what signals you may be indirectly sending. Sit up straight, make eye contact, try not to cross your arms, etc.
- 9. Practice your elevator pitch.** You should be able to speak or write your “elevator pitch” on cue. It can be 20-30 seconds (3-4 sentences) and summarize who you are and what you are looking for professionally or out of the connection. You never know who you will meet and when, so be prepared. For more resources on developing your elevator pitch, [click here](#).
- 10. Listen.** You were given two ears and one mouth, use them in that ratio. People like talking about themselves. Dale Carnegie would say that you could say nothing in a conversation and the other person would think it was the best conversation ever. People want to feel heard, helpful and valued. Of course, ask your questions and share your story – but use these connections as an opportunity to listen and learn.
- 11. A.I.R.** Our friends at W&M Law School like to recommend “AIR”: Advice, Information & Referrals. Consider asking about the company, state of industry, skills/experiences, culture, etc.
- 12. Don’t ask for a job.** In sales they say to wait until the 5<sup>th</sup> or 6<sup>th</sup> meeting before “making an ask”. The priority is to build a sincere relationship and ultimately a friendship. As they get to know you, they will likely tell you about a job if they think you are the right fit – but do not immediately ask for a job within the first few meetings. This does not make the alumnus/a feel appreciated or valued. According to Cohen, know that networking results in 75-80% of all job offers, so take your time and know it will come naturally if applicable.
- 13. Ask for contacts.** Never leave a conversation without another contact. This is how you build your network. Before you end the conversation ask if there is anyone else they would recommend that you speak with – and if so – if they are willing to make an introduction.
- 14. Keep in touch.** Too often students have one conversation and think that’s it. Building a network requires constant work and communication. Reach out to them as you see interesting articles that may follow up to your conversation. Share updates about your decisions, major/minor, and experiences so they know how you are doing. Explore events or associations you could join or go to together. Strong networks come from nurturing them and building trust and a friendship. If helpful, create a master excel document and track the alumnus/a name, company, LinkedIn profile link, personal things/experiences and a follow up date. Then you can sort by follow-up date and each month check-in with respective contacts.
- 15. Thank them.** Send an email or hand written thank you note within 24 hours of all conversations. Include something personal or specific that you appreciated or learned and/or what you plan to do with the advice they provided.

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## IV. LinkedIn 101

Can there seriously be yet another social media platform I need to partake? Yes, sorry! LinkedIn is THE premier venue to network and communicate to colleagues, prospective employers and anyone else that you do not have an email for and want to bring into your network. LinkedIn provides a platform to showcase your skill-set and basically serves as a modified resume. Think of it as a “professional” platform. It’s not a social/fun/MEME focused platform – it is 100% about building relationships, searching for jobs and making connections.

LinkedIn provides a fantastic do’s & don’ts page that you can view [here](#). In addition, swing by Cohen and pick up their “LinkedIn Profile Checklist”.

**Finally, we have included 13 Boehly Center suggestions below on utilizing LinkedIn.**

1. **Professional headshot.** You need one. If you do not have one, ask a friend or family member to take a picture of you in good lighting with a simple background. Be sure you are dressed in business professional attire, you brushed your hair, cleaned up facial hair, etc.
2. **Be honest.** Create your profile in an honest, humble but promotional way.
3. **Summarize skills.** Since you are a student and may or may not have relevant jobs to reference, it is important you market your skills in the Summary section. Explain your interests and skills and what you are seeking. Consider being more open ended than too specific as you do not want to turn any prospects away. For example, putting “I am a sophomore interested in Consulting” instead of “I am a sophomore, interested in health care consulting in Denver, Colorado” may leave more options on the table.
4. **Add the meat.** The rest of your profile will include a highlight of any full-time or part-time jobs you have had, your education and any clubs/organizations you have joined. You do not need to copy/paste from your resume, but add the highlights (Company, Dates, Title, Key Experiences). If you have volunteered, joined organizations or played varsity or club athletics, put them in the Organization section.
5. **Master your intro:** You have about 300 characters to introduce yourself, so be professional and specific. Alumni want to help but the more specific you are, the more likely they are to respond in a timely manner. They receive several “I want to learn about your experience” messages – consider including something about a timeline or upcoming experience so they are more likely to prioritize their response due to your deadline/timeline.
6. **Connecting is not networking.** In order to grow your network you “Connect” with other professionals. Once they have accepted your connection, this does not mean you are connected. Now is the time for you to go back to the [Networking Section](#) and start connecting.
7. **Highlight skills.** Like in a resume or cover letter, if you are going to add a skill or bullet about a skill under a prior job, think about what you did with that skill and why an employer would care about that skill/how they would utilize it. For example, to put “I’m creative” could be a lot stronger by writing “Have used creative skills to build a new student organization to connect business analytics and finance in order to better prepare students for the corporate world.” This now shows initiative, creativity, understanding of a relatable need and transferable skills.
8. **LinkedIn before & after.** It is customary to review someone’s LinkedIn profile before you meet and request to “Connect” after you have met.
9. **Safety first.** Like everything, LinkedIn is an online platform. We encourage you not to accept connections from people you have not met or have not provided a valid reason to connect.

- 10. Join groups.** LinkedIn has a variety of professional networks/groups within the individual connection opportunity. For starters, join the [Boehly Center LinkedIn Group](#) and then explore connections and interests from there!
- 11. Avoid conflict.** Avoid politics, religion and money. This is not the platform to post or comment about any ‘hot topics’. Focus posts or comments around professional topics, scenarios or experiences instead.
- 12. Be visible.** As our friends at the Graduate Career Management Center mention, make sure your profile is visible to recruiters (Settings & Privacy – Privacy Tab – scroll down to “Let recruiters know you’re open to opportunities”. Click ‘Yes’.) They also recommend getting rid of the “People Also Viewed” box on your profile sidebar so recruiters are not distracted by other profiles (Settings & Privacy – Privacy Tab – Change “viewers of this profile also viewed” to ‘No’.)
- 13. Use the Tribe network.** William & Mary has several LinkedIn pages/groups that you can search and connect. The main W&M alumni page has over 61,000 followers and they are all available for you! You may sort by geographic location, industry or search by company names. We have included three main pages for you to explore.
  - a. William & Mary Alumni LinkedIn Page: <https://www.linkedin.com/school/william-and-mary/people/>
  - b. Mason School of Business LinkedIn Page: <https://www.linkedin.com/school/wm-raymond-a-mason-schoolofbusiness/people/>
  - c. Mason Alumni of Color Network:  
<https://forms.office.com/Pages/ResponsePage.aspx?id=Prw8uR1mWECGk6iXuSS410gu8yltGRxOu2rVcGB9epxUQTc0SFNYMiZCSk9HNTA4TFdMQUs1OVZITy4u>

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## V. Waiting for & Responding to an Employer/Alumni Request

So, you've sent out your messages and resumes and now you are either waiting to hear back or you have heard back! Now what?! The sections throughout this guide will be a great resource for you. However, there are some specific things to consider when waiting for or responding to an employer/alumnus.

**Below are 9 tips to consider when you are preparing to or have already heard from someone of interest.**

1. **Voicemail set-up.** Be sure you have a simple, professional and non-offensive recorded message for those that will leave a voicemail. We also suggest having a recorded message vs the standard automated message of your telephone number. Avoid music, jokes and background noise. Let the employer/alumnus know you are there and you are an actual person.
2. **Check your spam.** This is a busy time. You have likely applied to several jobs or reached out to several alumni. Be sure to check your spam/junk folder frequently so you do not miss an email from an employer.
3. **Notify references.** If you had included a list of references in your application, now is a good time to let them know they may be hearing from companies. You can always do this in advance of applying as well, but references should know they are on your reference list before anyone would call. If they act surprised to an employer, that may indicate you did not communicate which may hurt you.
4. **Keep applying.** While you wait to hear back, be sure to continue to apply to additional jobs. You never know which job or when a job will "catch" so keep the options open!
5. **Be patient.** It takes companies a long time to review applications. Sometimes a company will get thousands of resumes, so it takes time to narrow down the pool. You can always email the recruiter if the application has closed and considerable time has gone by – but know they likely cannot give you any specific status updates on your application. Instead, they can likely update you on the overall timeline.
6. **Response time matters.** When they do call or email, you may get 24 hours to respond before an employer thinks you are no longer interested. Do not miss your opportunity by not responding quickly (immediate is ideal, then within 12 hours and if you're held up be within 24 hours). Being timely also illustrates you pay attention, manage time and would be likely responsive to clients!
7. **Respond regardless.** Whether you want the job or not, they deserve an answer. Be respectful and professional and follow the same guidelines to [Accepting an Offer](#) or [Declining an Offer](#) but instead of an "offer", it is an "invitation".
8. **Include availability.** If the employer has provided their availability, do your best to make those times work. If you sincerely cannot make any of their provided times work, respond with an apology & explanation and offer 3-5 additional time windows.
9. **Stay positive.** You are not alone. This can be an exhausting, emotional and draining time. Do your best to take care of yourself and trust the process. It'll all work out one way or another.

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## VI. Preparing for an Interview

Well done, you have caught an employer's attention! Now starts the hard part. Many companies interview numerous candidates over an extended period of time. We do not share this to intimidate you but rather help to prepare you. Preparation is key. Even if you think you are the best interviewer in the world and you have secured jobs in the past, you still have to prepare and practice. Professionals that are 20-30 years out of W&M and going for that CEO level job still prepare and practice and they likely have had MANY more interviews than you at this time of your life. The Cohen Career Center has a fantastic page about preparing for an interview, so we are going to guide you there by clicking [here](#). You may also swing by Cohen and pick up their "Effective Interview Strategies" document. **In addition, we have outlined 12 KEY tips (there are many more) on preparing for an interview below.**

1. **Practice, practice, practice!** Utilize the Boehly Center, Cohen Career Center, Big Interview (virtual interview platform through Cohen), mentors, faculty, club leaders, family members, etc. There are many resources available with sample interview questions. Know your resume and the answers to standard interview questions inside and out.
2. **Do your homework.** Research the company website, LinkedIn, recent articles, the individuals you are interviewing with and anything that helps to show that you came prepared and can speak about the company. Re-read the job description and be ready to showcase what about it attracted you to the position/company.
3. **Practice your elevator pitch.** Like when you were preparing to network, you should be able to share your "elevator pitch" on cue. It can be a little longer than when you were networking, 60-90 seconds is appropriate. It should summarize who you are (as a potential employee – not where you grew up and your life story) and what you can bring to the position/company. This is also a chance to throw in a few key strengths and why you are the right person for the role.
4. **Know the medium.** Know if it is a phone interview (pick a quiet place with good service, have paper for notes, resume/questions/website handy), virtual interview (dress professionally, make eye contact, do not fidget, stay engaged, see tips below) or in person interview (see tips below).
5. **Dress the part.** As mentioned previously, you never get a second chance to make a first impression. Recruiters/alumni already have a job and can be more casual in appearance or dialogue but you cannot be. Dress in business professional attire, which means a suit. Period. This is not the time to be flashy or wear something distracting, classic colors, classic suit is the safest route. In addition, make sure your hair is washed and brushed, any facial hair is neat or clean-shaven, shoes are polished, you are not chewing gum, etc. In addition, be aware of your body language and what signals you may be indirectly sending. Sit up straight, make eye contact, try not to cross your arms, etc.
6. **Be on time and present!** Arrive 10-15 minutes early. Consider driving the route the day prior so you know exactly where to go, where to park and what doors to enter. If you have to travel (45+ minutes) to the interview and it is early in the morning, consider getting a hotel room the night prior. This will help alleviate traffic stress and you can get a good night sleep without distractions. Make sure when you arrive you turn OFF your phone, tablets, computers, etc. All you should bring with you that they care about is your resume and any supporting documents.

7. **Body language.** Give a firm handshake, make eye contact, smile and be aware of your posture, gestures and body language.
8. **Avoid one-word answers.** Answering interview questions is an opportunity to share your skills and experiences. Answering the question, “Have you had any leadership experience?” can be answered in one word or an opportunity to self-promote. Imagine the difference in “Yes.” And, “Yes, actually this past year I was able to serve as the Vice President of Women in Business which is a Club on campus that focuses on professional development and preparing women for lives in business. During my time, I led three workshops around resume building, diversity & inclusion and mock-interview sessions. This really taught me about the importance of assisting others and time management; two things that I believe are great traits to bring to your organization.”
9. **Illegal questions.** Our friends at Cohen and the Graduate Career Management Center share the following: Questions should focus on functions of the position, company, or skills desired for a position. Employers cannot ask questions regarding age, medical history, children, disabilities, ethnicity/race, religion, etc. Answering in a way that is relevant to the position is always best; redirect the conversation or gently inquire if there is a business reason that requires the answer.
10. **Spin challenges.** We all have things we can work on. Some call these weaknesses during an interview, others will say challenges or challenging situations. These are the PRIME opportunity to shine. You have two choices: First, you may own it and spin it to something positive. Share an example of what you have learned, how you have grown, or how you used a challenging time to shift/adjust and it resulted in a positive result. Another option is to pick “positive weaknesses”. For example, if you know you’re not a “small talker” and asked about weaknesses, one may say, “I’m not a small talker... I know I am not the person to schmooze about sports or recent news – instead, I sincerely care about people and would much rather take that time to get to know you or a client and start to build a deep and meaningful relationship. In the end, I believe this type of conversation will be more impactful to my client, the relationship and ultimately, the company.”
11. **Have questions prepared.** You may think of questions during the interview, but come prepared with a few additional questions based on your research. This helps to show you did your research but also provides some more feedback on the company. If it gets to the Q&A section and you say, “I have no questions” that is not going to go well for you. Try to stay away from the general culture questions “what’s a day like, etc.” as you can find that out later – stick to questions that show you did your homework, impact the team or relate to some experience that shows a strength that you have. Pay attention to your interviewers when they describe their role, background, etc. because you can ask questions about them as some of your follow-up questions.
12. **Thank them.** Be sure to thank them at least twice. Once at the completion of the actual interview and then again following the interview. Send an email or hand written thank you note within 24 hours of all interviews. Include something personal or specific that you appreciated or learned and why you are excited about the opportunity to work there. If you met with multiple people, they should all get a personalized thank you note.

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## VII. Preparing for a Virtually Recorded Initial Screening Interview

From time to time, companies request a screening pre-recorded video interview. These may be a prompted question through a specific platform for a respective company or they may request you answer a question and record it and email it in. In both scenarios, there are some key things to consider before you hit “record”.

Here are **7 tips to get you started**.

1. **Review prior section.** Many of the items outlined in the [Preparing for an Interview Section](#) will apply in a virtual/recorded session, especially the tips on: “practice, practice, practice!”, “practice your elevator pitch”, “dress the part”, “body language”, “avoid one-word answers” and “spin challenges”.
2. **Practice, practice, practice!** Yes, this was mentioned earlier, but it’s that important! Utilize the Big Interview (virtual interview platform through Cohen) or record a sample interview you’re your phone and send it to the Boehly Center, Cohen Career Center, mentors or faculty to review. There are times you do not realize you have a “tick” or habit until you see it on camera. Yes, it’s awkward to watch yourself on video, but that is how you get better. Think about how professional athletes watch film to see plays, challenges or mistakes. It’s the same with video interviewing. Practice, practice, practice!
3. **One shot.** Know that many companies only allow you one “take” – so before you hit “record”, be sure you are ready. We often hear from employers that they can tell someone was caught off guard and then they are clearly in a distracted panic than performing an interview, making your one shot over before it even started. If you do get a chance to re-record and you think you need to, do it, even if it adds more time.
4. **Be professional.** It may feel silly to talk to a blank screen with a little red dot showing you are being recorded. However, the employer will only see the video you produce. It is very important that you treat it like an “in person” interview and remain professional, focused and engaged. Keep your phrasing professional and when in doubt – lean towards being more formal than informal.
5. **Eye contact.** Like when you are on Facetime or video chat, the camera is your employer’s “eye”. Make eye contact with the camera as if there is someone sitting right across from you. It is very obvious when someone is looking at notes, looking at their own video or distracted. If you would not do it in-person, do not do it on camera.
6. **Don’t read.** We hear often that employers can tell when someone is reading from a script, sometimes word for word. This does not come off natural. It’s ok to write out your thoughts or write down notes to cue you – but do not read from a script.
7. **Be you.** This is a screening interview. Be yourself, take it seriously but not so seriously that your nerves keep you from being you! If helpful, pretend you are talking to someone that you know, just be more formal/professional.

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## VIII. Writing or Emailing a Thank You Note

As our partners at the Cohen Career Center state, “Thank you notes are not simply formalities - they are necessities.” Hand written or email thank you notes are considered appropriate in today’s society. However, we highly encourage setting yourself apart and completing hand-written or even both when appropriate.

Here are **8 tips and sample notes to get you started.**

1. **48-hour rule.** Write and send note within 48 hours of meeting. Consider updating them throughout the year with your experiences & successes. Even if you are outside of 48 hours or missed a deadline, it is better late than never, so put it in the mail or just hit “send”.
2. **Thank ALL parties.** Write separate and specific notes to everyone you encountered or that supported/interviewed you. Do not lump them together, even if they are in the same office.
3. **Handwritten.** Try to say goodbye to computers and emails for a moment. When it comes to an honest and heartfelt thank you note, handwritten are very powerful. This will also help you stand out, as so many people no longer write them by hand. Consider writing out your letter on scrap paper or on your computer first and then transcribe it to the stationary. However, if you know that the organization is making decisions on which candidates will move forward, shortly after you interview ends or the next day – then it often is best to send a thoughtful email.
4. **Write clearly.** If they cannot read your handwriting or there are typos, the thank you is lost. Lastly, if it is handwritten - sign your name so they can make out whom you are. If there is no other indicator, they may not know who wrote the nice note and again, the “thank you” is lost.
5. **Be specific.** Reference something specific that you have experienced or that brings meaning and value to the meeting/experience. It is helpful to take notes during the meeting so you can attribute specific comments appropriately. General phrases like “Thank you for your time” are more powerful when written, “Thank you very much for your time and the opportunity to connect. Our conversation about the difference between equity & credit research was immensely helpful and I plan to proceed with exploring credit research thanks to your help.”
6. **Remain professional.** Remember, these individuals may continue to help you throughout your career. As you have heard, “you never get a second chance to make a first impression.” Avoid casual phrases and assumptions. Upon starting & signing your letter, consider a professional start and valediction such as “Dear”, “Good Morning/Afternoon”, “Best”, “With Appreciation”, “Best Regards”, “Sincerely”, etc.
7. **T-CUT.** Dale Carnegie suggests the “T-CUT” method to frame your thank you (note or in person).
  - T-hank the person(s)
  - C-redit the people that helped you
  - U-se: tell the person how you will use the help
  - T-hank them again
8. **Proofread x3.** Check your spelling! Be sure the words in the letter *and* the individuals name/company are correct. After you have read it once for spelling, read it again for flow, and once you have transcribed it – read it one final time. If you handwrote the letter and made a mistake, start over on a *new* piece of stationary, do not cross out or use White Out.

We have included some samples for Alumni Networking & Interview Follow-Up Thank You Notes on the next page. Please do not just copy & paste these – but instead review, take concepts from them that you like and draft your own note.

## SAMPLES

#1) Dear Mr. Miller,

Thank you very much for taking the time to speak with me yesterday. I truly enjoyed our conversation about the differences between equity & credit research and I look forward to exploring the industry area further. It is hard to believe that I will be graduating in a year and I hope we can have the opportunity to connect again as my plans finalize. Thank you again for being willing to assist me in this process and I hope you have a wonderful remainder of the summer.

Sincerely,  
John Tyler

#2) Good afternoon Mrs. Wren,

I hope you are having a great day. I wanted to reach out and thank you for the fantastic conversation this morning. Ever since I was ten years old, my parents would take me occasionally to Wall Street so I could watch the chaos and experience the energy. I truly enjoyed hearing about your Wall Street experiences and how you have navigated your career. As I mentioned on the phone, I hope to break into Investment Banking and particularly Capital Markets. I appreciate your willingness to connect me with some of your colleagues and look forward to receiving your email. In the meantime, I hope you will not mind if I keep in touch and the next time I am home in NY for a school break, I hope we can connect in person. Thank you again.

All my best,  
Griffin Gold

#3) Good Morning Ms. Tucker:

Thank you for the opportunity to interview for the financial analyst internship at JP Morgan this morning. It was an absolute pleasure to meet you and the team, and have the chance to see the space. I truly enjoyed our conversation about the position expectations and the rotation program. I am excited for the opportunity to utilize my analytical and communication skills and make a direct impact to JP Morgan's investment team.

Please feel free to contact me directly at (757) 555-5555 if I may answer any additional questions or provide more information. Thank you again and I look forward to hearing from you.

Regards,  
Mary Tribe

#4) Dear Mr. William

It was very enjoyable to speak with you today about the risk management internship position at Morgan Stanley. I greatly appreciated your creative approach to building your client base. In addition to my passion and enthusiasm for the work, I am confident I will bring strong writing skills, attention to detail, time management skills and a dedicated work ethic. Thank you for the opportunity to meet with you and your team. I look forward to hearing from you and appreciate your time and consideration.

Best,  
Blair Green

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## IX. Receiving & Accepting an Offer

Congratulations! You have received an offer. This is fantastic and we are proud of you! This is an exciting time and you should take time to appreciate your efforts that got you to this point. Now comes the fun part, when you can say “yes”!

**Below are 13 items to consider during the receiving and accepting an offer stage.** In addition, click [here](#) to see additional suggestions from the Cohen Career Center.

1. **Thank them!** Upon receiving an offer be sure to thank the company, regardless of your plans. Show your appreciation and excitement for the opportunity.
2. **Ask for a formal offer letter.** Make sure you have it in writing (email or letter).
3. **Sleep on it.** If you receive an offer, it is perfectly acceptable to say you need time to process and think about it. If they say you need to tell them on the spot – you may want to consider what working at that company would really be like down the road. Cohen also has a great resource on “exploding offers” for companies that have recruited at W&M in the past.
4. **Determine the timeline and next steps.** Be sure to ask what a reasonable timeline is for you to respond. Depending on the industry, this could be a week or a month. It is important to know this answer so you can get your thoughts together before the deadline. If it turns out you need a few more days to process your thoughts, you can always ask the company for a reasonable extension but do not expect it will always be granted.
5. **Get all of the information.** If there are outstanding questions, concerns, issues – now is the time to ask them. You want to know all of the pieces of the puzzle before accepting (salary, benefits, retirement, healthcare, paid time off, culture, professional development, mentorship, support, the team, flexibility, etc.). Note: this is not the time to negotiate salary – but you should know what it is at this time.
6. **Consider retirement.** You are in your twenties – who thinks about retirement? Well, retirement adds up and it is important to consider the retirement package, if offered as part of your benefits. Is there a match program? Is it vested and you would have to work for a certain number of years before being able to receive the benefit, etc.?
7. **Meet the team.** Once you receive an offer, if you were unable to meet the entire team that you would be working with during the interview process, ask if you can set up a meeting or Zoom with the team before accepting, so you make sure you know the personalities/culture.
8. **Salary.** Some employers will ask you to share your desired salary before disclosing a figure. Do your best to have the organization disclose a number or range first. Be prepared, know the market value (if possible) or be prepared to ask for the market value of the position if needed.
9. **Salary negotiation.** This is always a tricky thing. This is something that should be done a few days after you received an offer and only if they meet your desire and you would still say yes. It is unfair to ask them to go to bat on your behalf if you would not be loyal to their updated offer. You want to make sure they have time to see if it’s possible and you would have time to evaluate an updated salary (if they are able) before the deadline. Sometimes the offer is completely fair and valid and a negotiation is not necessary. If salary negotiation is not available, you can possibly explore benefit negotiation like additional time off, professional development budget, or retirement matches, etc.



*(Salary negotiation continued)* Do your research and have a valid/strong reason for why you are seeking a negotiation. Once you accept an offer, we suggest that you commit to it. As a first-job, there is usually less room for negotiation as there may be a flat starting salary or they know there are many other students that would happily accept their original offer. Be realistic, be fair and do not burn a bridge. Sometimes the added value of getting “in the door” and showing your value is a necessary first step.

- 10. Let's do this!** You've decided to accept, congratulations! Set up a phone call with the hiring manager instead of an email. Express your excitement and appreciation.
- 11. Update others:** Once you have accepted at a company it is important you update the other companies you may have received offers or are still in the applicant pool. If you have received an offer, see the [Declining an Offer Section](#). If you are in the applicant pool and want to withdrawal your application, a simple email will suffice to the recruiter or if they reach out to you for an interview, inform them politely that you have accepted another opportunity. This is important because they may be waiting on your update before asking another candidate to fill the role. And, this candidate could be a classmate – so you want to help them out!
- 12. Update us.** We want to know what you decided! Update the Boehly Center and Cohen Career Center with your decision so we can update our records and celebrate with you!
- 13. Celebrate!** Treat yourself to something positive and healthy for you and appreciate your success and new job!

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## X. Deciding About or Between Jobs

Wow, you are in an incredible situation where you have a choice! Congratulations! This truly is a wonderful thing even though it may feel like you are about to make the biggest decision of your life. Take time to appreciate the hard work that got you to this point. You earned it and not everyone is in these shoes. The “analysis paralysis” that can come when trying to make a difficult decision can be debilitating, demoralizing and stressful. It can drive insecurity and doubt.

Here are **12 tips and tricks to help with deciding on or between jobs.**

1. **Determine your priorities.** Write out your top 3-5 priorities for life and/or work. It might be salary, location, weather, proximity to family, title, growth potential, mentorship, long-term goals, etc. Determine if the job(s) align with your priorities. Here’s a little secret, your priorities will change throughout your career – so pay attention as these shifts occur.
2. **Make a pro/con comparison list.** Get a piece of paper for each company and fold a piece of paper in half. On one side write PRO (positive things) and on one side write CON (challenges/negative things). Then fill up the columns accordingly. Sometimes when you look at everything written down, it’s very clear which is the best choice for you (which job or to accept or not).
3. **Talk it out.** If you have support in your family, friends, counselors, mentors – talk out your pro/con list and thoughts. If you do not feel comfortable speaking with someone, consider a journal. Sometimes getting the thoughts out and having to articulate them helps to provide clarity.
4. **Gain perspective.** Consider tangible vs. fear based concerns. The unknown is very scary. Do your best to separate thoughts that are tangible vs. fear based. What are actual things you can control and how does that impact your thoughts about the job(s)? Fear is natural and any new job will likely come with some level of fear – but having that drive your decision can lead to more doubt and regret.
5. **Consider the entire package.** Remember those priorities in bullet #1 – consider how those priorities match up with the offer (salary, benefits, paid time off, culture, professional development, mentorship, support, etc.).
6. **Sleep on it.** Spend one day imagining that you have accepted job (A). Picture the day-to-day, roles & responsibilities, people, commute, salary, etc. Write down at the end of the day how that felt. The next day, spend the day imagining that you accepted job (B). Follow the same process. Sleep on it. The third day, wake up and think through the realities of both jobs – did one feel more right than the other – even if you cannot articulate why?
7. **Did you like it?** Sometimes you determine what you like by what you do not like – so how did you like the prospective job, the people, the culture, the work, etc.?
8. **Transferable skills.** Experiences are never a waste. You are learning and creating transferable skills whether you realize it or not. Take every opportunity to learn and grow and if you still decide it is not the right fit, trust the process and your decision and know that you can market what you learned in a future job interview and utilize these skills again down the road.
9. **Be careful of “want” and “should”.** Sometimes you know what you WANT but you are torn by what you SHOULD do. Perhaps this comes from internal or external influences or a mix of both. Be aware of the difference when making your decision.

- 10. Trust your gut.** At the end of the day, your gut will tell you when push comes to shove which way is right for you. You will be fine! No matter what you decide, you will be just fine. After all, you are a W&M student. Stay positive, be honest with yourself and know we are here to support you.
- 11. Commit to your decision.** Once you have decided, do not look back. You will never know the path you would have been on if you went the other way, so instead, put the energy into your decision and go with it! (Of course, do not burn a bridge at the other company either.)
- 12. Accept the offer.** Congratulations, you have made the decision! Now visit the [Receiving & Accepting an Offer Section](#) for next steps.

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## XI. Declining an Offer

Not every job is meant to be. Congratulations on realizing this reality. It can be difficult to have hard conversations and sometimes it can be rather intimidating to break bad news to an employer. Especially if you had a wonderful experience and there were no major red flags besides it just did not feel right or was not right for you at the time. Remember, we make the best decisions at the time, with the information we have at that time. We are proud of you for making the decision.

Here are **10 tips to consider around declining an offer.**

1. **Don't delay.** Employers have asked you first. If you know you are going to decline, do not hold them up as they may then miss a chance to get the next candidate. Be considerate. Of course, if you need time to think it through, it is your right to take that time. However, once you have made up your mind, let them know.
2. **Set up a call.** You have decided to decline an offer. Set up a phone call with the hiring manager instead of an email. This may feel uncomfortable but this exemplifies professionalism and increases the potential of future relationships.
3. **Be thankful.** Be sure to thank the employer for the opportunity and for the offer. If you had an internship there prior, consider sharing a few impactful or favorite memories.
4. **Less is more.** Be respectful and honest but you do not need to go into all of your reasons for declining. Get to the point in a respectful manner and do your best not to burn any bridges.
5. **You can only control you.** Most people are professional and understanding. However, remember, you can only control you and you have no control over an employer's reaction.
6. **Take deep breaths.** An uncomfortable conversation is about to take place. If you feel your emotions getting the best of you, take a deep breath, speak slowly and just get through it.
7. **Consider staying in touch.** Depending on how the conversation goes, you may consider asking if they would mind if you kept in touch. This is a great way to not burn a bridge and you can add them to your network.
8. **Update your teammates.** After the conversation with the hiring manager, reach out to any of the employees that you connected with or worked with in a prior internship. They will be anxious to know if you accepted. You do not need to get into long conversations, depending on the relationship a short, sweet and appreciative email will do the trick. Remember to do your best to keep them in your professional network as well!
9. **Trust your decision.** It is your gut again! At the end of the day, your gut will give you the confidence that you are doing the best thing for you.
10. **You will be fine!** This might have been a very difficult and exhausting experience, take time to relax and move forward.

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## XII. Reneging an Offer

This is always a tricky one. William & Mary encourages students to commit and standby their original professional decision. Reneging/retracting offers can (not always) hurt your reputation, the school's reputation, future student applicants and the reputation of any alumnus/alumna/contact that made the introduction for you with a specific company. Remember, it is a very small world and employers talk. In some cases if you renege, you will actually be removed from being provided additional advising support from W&M and/or access to certain platforms.

With that said, from time to time, emergency or exceptional scenarios present themselves and students are faced with reneging or retracting an offer. These are tough situations and ones we hope we can avoid if you consider the enclosed guidelines throughout this pamphlet. If you find yourself in this situation, please reach out to the Boehly Center at [Boehly.Center@mason.wm.edu](mailto:Boehly.Center@mason.wm.edu), visit the Center in Miller Hall Suite 2002 or contact the Cohen Career Center. We want to help you think through the scenario and conversation.

**We request you contact us before reneging an offer. However, in the case you will not contact us for a variety of reasons, we have provided 10 things to consider in this situation.**

1. **Review your contract/agreement.** Be sure to review the agreement before reaching out to the employer. Some hiring agreements do not permit reneging an offer or there are penalties/non-competes, etc.
2. **Don't delay.** Like the [Declining A Job Offer Section](#), employers have dedicated a lot of time into you – so they will need to find someone to replace you. The sooner they can start that process to get strong talent, the better.
3. **Set up a phone call.** This should not happen via email. This may feel uncomfortable but this exemplifies professionalism and increases the potential of future relationships.
4. **Be polite and respectful.** Do not be negative or compare the companies/situations. Have tact and grace.
5. **Recognize the scenario.** Acknowledge the tough situation you may be putting the employer in and apologize (consider apologizing again at the end).
6. **Be concise and honest.** Explain your situation but skip the details and stay high level.
7. **Be grateful.**
8. **Do your best not to burn a bridge.** Stay as positive and thankful as possible.
9. **Understand the consequences & risks.**
10. **Learn from this experience.**

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### XIII. Transitioning from Student to Employee

All transitions are difficult. As much as some of us claim to like change, that does not mean change is always easy, fun or predictable. For many of you, this will likely be the first time you are officially “on your own.” Perhaps you have never moved somewhere that you did not know anyone in advance, perhaps you have never had to manage your own home, finances, transportation, etc. Maybe you are moving away from your home state for the first time or you took a risk and you are unsure if it was the right decision.

Remember, your feelings and concerns are valid and you are not the first person to experience such a transition. In fact, every person who has ever graduated from college has had to make a similar transition. In other words, you are far from alone!

Here are **10 reminders and tips that may help.**

1. **It is different.** Any job you accept is going to be a different experience than being a student.
2. **Schedules change.** A work schedule is different from a classroom schedule. Period. End of story. You WILL adjust and you will get used to the new hours, in fact, you may find yourself thriving on the structure and schedule.
3. **New hours.** All jobs have long hours (10-15+ hour days). It is just a matter of how frequently they occur.
4. **Time management.** You likely have never experienced the influx of emails that is a reality of working until you are in the corporate world. Time management and organization are imperative to your success as an employee. Determine your system (filing, flags, leaving unread until deal with them, etc.) so you can stay on top of them and not miss anything.
5. **Perception is reality.** Develop your personal brand.
6. **It's not college.** That college lifestyle is not always welcomed in a professional setting. One third of your life will be spent at work; therefore, you spend a lot of time with our co-workers. It can be difficult to not blend work and home-life. Having friends at work is important but be smart about blurring the lines. Some things are hard to take back and better to always remain professional, regardless of the environment.
7. **Grow your network.** Stay in touch with your classmates from college, other employers you met during college, colleagues at the new job, their friends/contacts, etc. Do not burn any bridges and keep your network strong.
8. **Travel in style.** Although those leggings or favorite hoodies are great to get cozy on a plane or train - you never know who you will meet or run into. Always be ready to market yourself and share your elevator pitch. You are no longer a student, you are now a professional and you do not want to meet the CEO of your dream company on a plane and look like a mess. This goes for professional or personal trips! And, if you are traveling for work in your new role, always dress in business professional or business casual attire as you are representing your company.

9. **It's a small world is not just a Disney song.** Kevin Bacon's six degrees of separation is not a hoax. You never know who knows whom and bad news travels a lot faster than good news. Even if you are in the wrong place at the wrong time, rebounding from bad PR may affect your career forever. Also, alumni and employers talk. Some were classmates or they travel to career fairs and see one another 'on the circuit' – as they say mind your "Ps" & "Qs".
10. **It is ok not to know the answers.** You are new at a job, there is a lot of on-the-job training that takes place those first few years. Be patient, be honest and ask questions. Your team will want you to succeed so know that you are not on an island.

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## XIV. Email Time Management & Prioritization

You've made it! You have joined an incredible group of alumni and you are officially in the Tribe Alumni Community. Go Tribe! In addition to the [Transitioning from Student to Employee Section](#), adjusting to an entirely new system of email management can be daunting for many. It is worth noting that although social media has become more prominent, email is very present in the post-College world.

To give you an idea, on an average day, according to Forbes and Radicati Group, the average person receives 78 work emails a day and sends approximately 37 a day. That's not including personal emails. They took it a step further and share that the average employee checks their email 36 times an hour for a grand total of 288 times a day for an 8-hour workday. Our point, email is a HUGE part of the job experience. So, on top of managing 115 daily emails, staying up to date with business news, meetings (trust us, there are A LOT of those too), projects, the random check-in/catch ups from co-workers, food and bathroom breaks and doing your actual job – there is a lot to manage between 9 AM – 5 PM (or whatever your hours may be). Getting a grip on your email tracking and prioritization is a great first step to time management.

**Here are 10 things to consider when it comes to managing and prioritizing your influx of emails and competing demands.**

- 1. Make your system.** Suggestion #1, GET A SYSTEM. Figure out what works for you because leaving every email you have ever received in your inbox is likely going to backfire. There are many resources out there but some examples might be: A) Make folders and file emails you have read and completed/responded to in the respective folders as you do them. B) You can prioritize your emails by color/flags or leave them as unread until you have read/filed them. C) Use rules/filters to automatically manage email habits.
- 2. Block time.** It is too easy to fall into the 36x/hour email checking. Instead, block time at the start and end of your day to deal with your emails. That way you can utilize the main part of the day to get your actual job done or attend important meetings. If the start/end of the day is not the best time, look at emails over a specific 1-2 hour chunk and then be done with it until the next chunk of blocked time arrives. When you are doing emails, do not work on the side on a project or answer a phone call. If you were on a phone call, you would not be checking emails, right – so why should it be the other way around? Focus on emails. Period.
- 3. Manage threads.** Emails are forwarded, or there are TO, CC and BCC fields - you may get the same email from multiple people not realizing you were copied on the original. Whew, it can be rough – but they are all important and deserve to be reviewed and/or organized in your new system. Sometimes you are receiving the email as an FYI and sometimes it's to engage – so make sure you know your role to respond or not. You can group your subjects/threads or leave them as independent emails. Either works, just pick which is best for you.
- 4. Top down or bottom up.** You will learn quickly which you prefer. Start at the first email of the day and go to the most recent – or reverse. Either works but a warning, if you do bottom-up, make sure you scan for related responses from co-workers so you are responding to the most up-to-date thread.

5. **Prioritize.** Manage the emails that are associated with a timeline/deadline first then get to the rest.
6. **Don't go backwards.** Read it and be done with it. It takes more time to have to come back to an email and re-read it then it does to just deal with it the first time. Read it, deal with it, organize it. Move on.
7. **Timely responses.** As we are all too familiar, instant responses are expected, but not always realistic. Set a personal goal, for example, "I'll respond to all emails within 24/36/48 hours." Of course, if you choose 48 hours you need to make sure you are aware of deadlines as deadlines do not care if your rule is 48 hours and the deadline is in 12!
8. **Communicate.** The sender of the email you are reading is likely important to your project, job, career or network. Therefore, treat them with respect. If you see an email and know you need more time to process or tend to it, let them know "I want to be able to give this email the time it deserves, I'll be able to respond in more detail by tomorrow at 3 PM." However, then you better respond by tomorrow at 3 PM. Again, people think instant responses are coming, so to avoid a follow up email (and yet another email!) "did you see my email from 9:20 AM" – just communicate up front.
9. **Vacation curse.** Nothing is worse than returning to the office from a peaceful vacation and it is like it never happened by lunch on the first day back. If your colleagues are on vacation, try not to email them. Or, open an email and keep it in your drafts and put everything you need from them in ONE email each day/week. Then they get ONE email instead of 8 from you and it's very helpful. Similarly, when you are the one on vacation, put up an Out of Office and let them know that you will respond to emails a few days after you return (put a date) so they know you are back, but you are getting through your emails. This will avoid yet another email "I think you are back, did you see my email from 9:20 AM on Tuesday?"
10. **Phones still work.** If you can pick up the phone and answer the question/need in 1-5 minutes, pick up the phone instead of sending another email. It helps all involved. Just make sure you focus on the reason for the call and do not get distracted with small talk! Ask that question, say thank you and hang up the phone.

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## XV. Understanding Office Culture

Ever watch or heard of the *Wizard of Oz* and the famous line where Dorothy says to her dog Toto, [“We’re not in Kansas anymore”](#)? Well, sometimes adjusting to office culture feels a lot like “You’re not at W&M anymore.” As we covered in the [Transitioning from Student to Employee Section](#), any job you accept is going to be a different experience than being a student.

This is also a fantastic topic to discuss with a mentor or alumni that you may connect with after reading the [Networking Section](#). Each company will be slightly different, but there are a few key things to consider.

**Check out the below 12 concepts to consider when you are starting in an office.**

- 8. Adjust.** It’s perfectly normal to have an adjustment period. Take it all in, go through your orientation, read the employee handbook. Take deep breaths and enjoy that all of your hard work, dedication, experiences, support and coursework got you to this point.
- 9. Observe and listen.** Even if you were THE go-to person in a recent course, student organization or sports team – it may be better to observe first and for a while when you get to your first job, or any job in the future. Learn the procedures, personalities, expectations and politics of the company and/or team. There is a fine line between arrogant, cocky and confident.
- 10. Be flexible.** You may get pulled in a lot of different directions. Take it all in and see every opportunity as a chance to learn. It may be shadowing a new project/program, or it may be learning a new leadership skill from a director, or it could just be to find the way to the bathroom. All are helpful experiences so be flexible and be willing to learn.
- 11. Stay open minded.** Ever walk into a museum for the first time and feel that “there is SO much information to take in.” It can be overwhelming or you may be too quick to judge which exhibits look interesting or not worth your time. Be careful of doing this at your company. Stay open minded and try to withhold judgement, if possible, because there may be a bigger picture at play or more to the story that you do not know. Just be happy to be in the room.
- 12. Avoid gossip.** Yes, gossip is still a thing, even in the Post-College world. Like every other time in your life, it can be hurtful and lead to a negative climate. Best advice, just do not get involved in or spread gossip. You do not want the boss of the company to hear that you were the one spreading false or negative information. Similarly, know the time and place to share “college stories”, it is usually not the best plan within company walls.
- 13. Be positive.** Like everything, you will get out of the experience what you put into it. Try to hold on to the positives and learn from the challenges/negatives.
- 14. Meet colleagues.** If there are opportunities to go to lunch, volunteer together or just sit in the break room with co-workers – do it. Take the time to meet your colleagues. Similarly, if someone needs help, offer to help. This is a great way to build a positive reputation and be someone who is dependable and a great teammate.

- 15. Own it.** Whether you have made a mistake, worked together with a colleague on a project, learned something from a supervisor – own it. If you made a mistake, fix it, own it and move on. If you are in a meeting and you receive sole credit for something you worked on with someone else, as soon as there is a break in conversation, politely clarify that (insert name) assisted as well. Being able to share successes in public and critique in private is an important skillset.
- 16. Hard conversations.** There will be a time in your first job, maybe several times, when you are going to have hard conversations with your supervisor, clients and co-workers. This is normal but how you handle the conversations is where you can truly grow and become respected. The corporate world is less likely to nurture you. People can be brash, hurtful, direct and sometimes inappropriate. Know that you can only control your actions, and how others handle situations is on them, whether you agree or not. Try not to take things personally and keep working hard. If things take a major turn for the worse, talk to your mentors and obtain advice or contact the company Human Resources Department.
- 17. Leaders or managers.** They may sound the same but they really are quite different. Here's a little secret that you may have already uncovered: not all managers are good leaders and not all leaders are good managers. In short, management skills are used to plan, build and organize goals and systems where leadership skills are used to set the goals, establish a future direction, motivate and inspire. Ideally, your supervisor and colleagues have both sets of skills, but often you will find the scale favors one or the other. Both can be assets and strengths to a team so learn from all but do not be surprised when you encounter this difference.
- 18. Deadlines.** Remember when that super nice professor gave you an extension on a paper... well do not get in the habit of receiving extensions when you start work. Depending on the scenario, it may not even be appropriate to ask for an extension. Hopefully you were part of the planning process to establish an agreed upon deadline so you can plan accordingly, but sometimes, deadlines get dumped on you quickly and you have to manage your time appropriately to meet a deadline. You definitely do not want to be known as someone who misses deadlines and may not be reliable.
- 19. Work hard.** Your first job is where it all begins. You are a W&M graduate, you know how to work hard! There will even be occasional times you are tested and pushed more than you would prefer or think you can manage – continue to work hard and get through it assuming it is not detrimental to your personal health of course! It is likely that your next job will come out of relationships you build in this first job, so build a reputation for being reliable and hardworking and it will serve you well throughout your career.

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## XVI. Adjusting to a Virtual Office

Since the COVID-19 pandemic, corporations have had to completely or partially shift to a virtual platform. Most of the suggested tips from the [Understanding Office Culture Section](#) apply in a virtual setting. However, when relying on a virtual platform there are some differences or shifts to the “in office” experience.

**We have outlined 10 additional tips to consider about adjusting to office culture, specific to a virtual platform.**

1. **“Virtual Box”.** This is a thing. How others perceive you is now limited to a small box on a computer. Have a clean, clear, professional background. Close the bathroom door and take your dirty laundry off the doorknob. Have good lighting so they can see your face (avoid backlight from a window or lamp). Similarly, if you are on a group call, yes we can see if you are not paying attention or having a side conversation. Be present!
2. **Get dressed.** Put on real work clothes so you feel better about yourself and in case you have to reach for something while on video, you are not caught in an awkward moment and accidentally expose yourself. Pop up meetings happen as well, so you need to be ready. You are expected to be at work, just remote, so treat it as if you are at work and look professional at all times.
3. **Body language awareness.** Virtual body language is something that must be a constant reminder. It is exhausting to be on back-to-back video calls, but other participants expect you to be on your “A game” and they deserve to have your “A game”. People can tell when you are disconnected, so be aware of how your body language could be perceived through a virtual platform. Examples of positive body language include; smile, uncross your arms, lean forward, make eye contact, sit up straight, etc. Basically, the tips we would suggest in person, apply on a screen too!
4. **Be flexible.** We have all been on a virtual video call or phone call and the dog barks or you see a child run across the background – be patient, be flexible and be empathetic. Everyone is adjusting the best way that they can.
5. **Stay engaged and ask for help.** In an office if you need help or had a question, you can run down the hall and ask. In a virtual world, that is much harder but it’s important you do not lose the connection with your colleagues. Consider a group text or a team chat platform where you can stay connected and still receive the support that you need.
6. **Access to supplies.** Similarly, the ability to run down the hall for a red pen is now gone. Talk to your supervisors about how to manage supplies so you are prepared. Also, try to think in advance so you are not caught without what you need when you need it.
7. **Over communicate.** You do not want your supervisor to wonder what you are doing. We are not saying you owe them a daily report because that likely would not happen in person either, but it will not hurt you to keep them from wondering. It is too easy to become buried in your work in a virtual world, so remember to pop up every once in a while and check-in or share an update on a project you are working on.

8. **Learn preferences.** Similar to when you are in an office, you have the people that come by your office to just chat, or the ones that prefer to be left alone, or the ones that prefer to connect over lunch or after hours. It is not much different in a virtual world, as some prefer video, some prefer chat and/or email and others may prefer phone. Your preference may not be their preference, so it is a good idea to have that conversation so you are working in cohesion with your colleagues.
9. **Email overload.** Refresh your memory on the [Email Management & Prioritization Section](#). Get ready for even more emails due to virtual work.
10. **Know platform basics.** Be aware of mute/unmute, video or no video, how to share a screen, make a poll, do breakout rooms. You never know when you will be asked to step up, so it is helpful to be aware of the platform basics. Similarly, if you are a guest on a call, be aware of the mute/unmute and video features. Be present and do not be the one causing noise or distractions!

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## XVII. Recommended Finance Resources, Articles & Books

There are numerous resources out there to prepare you for updates, industry shifts and news. The below list is a start and not a complete list. We recommend comparing numerous sites and building your own knowledge base. Note that W&M has access through your W&M ID to many of these resources.

*The following News & Podcast lists were compiled by alumni in the field of financial services.*

### News Outlets:

- Wall Street Journal (WSJ): [www.wsj.com](http://www.wsj.com) Consider “The Daily Shot” Newsletter (W&M Access)
- Bloomberg/CNBC: [www.bloomberg.com](http://www.bloomberg.com)
- Economist (Global): [www.economist.com](http://www.economist.com)
- Barrons: [www.barrons.com](http://www.barrons.com) (W&M Access)
- The Week Magazine: [www.theweek.com](http://www.theweek.com)
- Morning Brew: [www.morningbrew.com](http://www.morningbrew.com) Consider “Daily Newsletter”
- The Skimm: [www.theskimm.com](http://www.theskimm.com) Consider “Daily Newsletter”

### Podcasts:

- Boehly Center *Careers in Finance* Podcast
- W&M Leadership & Business Podcast: <http://mason.wm.edu/programs/cce/podcast>
- WSJ Podcasts
  - *The Journal*: The most important stories, explained through the lens of business. A podcast about money, business and power. Hosted by Kate Linebaugh and Ryan Knutson. The Journal is a co-production from Gimlet Media and The Wall Street Journal.
  - *Your Money Briefing*: Your must-listen for valuable money and market stories from The Wall Street Journal. Each weekday our journalists from Heard on the Street, the Intelligent Investor and other popular features share insights on investing, markets, taxes and retirement planning.
  - *Minute Briefing*: Speed through top news in a flash. Get the most important stories you need to know from The Wall Street Journal three times daily. Whether it’s the latest on the economy, news from Silicon Valley or closing numbers from Wall Street, stay in the know during your weekday commute.
- The Economist Podcast: *Money Talks*: Money Talks is an immensely popular program that has everything to do with *money*. How to make it, how to spend it, how to grow it, and how to avoid letting it get away. Well-known, well-connected, articulate and knowledgeable, Michael Campbell is one of Canada’s most respected business analysts.
- Robinhood Snacks Podcast: *Snacks Daily*: Get an *entertaining* breakdown of our top 3 business stories in 15-minutes.
- Axios Podcast: *Pro-Rata*: Get smarter, faster on the most talked-about topics in tech, business and politics in just 10 minutes. *Hosted* by Axios' business editor, Dan Primack.

The following News & Book lists were compiled by former Boehly Center Executive Director, Professor Carl Tack.

### News Outlets:

- WSJ
- NYT (W&M Access)
- Washington Post (W&M Access)
- The Economist
- The New Yorker
- The Atlantic

### Financial Books:

#### **Corporate Finance**

- *Value, Koller et al (2011)*. This is the book used in my undergraduate Corporate Financial Strategy course (F.2020). I also use this book in my MBA course for non-finance concentrators, Corporate Financial Policy. It is a very approachable book about the economics of corporate governance for non-finance professionals. Not particularly fun, but interesting nonetheless.
- *Valuation, Koller et al (various editions)*. This is the finance professionals' version of *Value*, and is pretty much the go to reference book on the subject of corporate valuation. It is very much a reference book, not a narrative; you will want to dip into as and when needed, not read it cover to cover. Think of this as a companion to your *Training the Street* course and materials.
- *Warren Buffett, Annual Letters to BRK Shareholders*. These are pretty much required reading in large parts of the investment and corporate finance world. You can pull these off the Berkshire Hathaway web site. Read also the *BRK Owners' Manual*, also found on the website. If you become very interested in Warren Buffett the man, I recommend *Snowball* (Schroeder)
- *The Smartest Guys in the Room, McLean*. This is the story of the rise and fall of Enron, an absolutely fascinating episode in recent US corporate history. This is a fun read, and you will learn more than you ever wanted to know about off balance sheet financing. Who would have guessed that this rather esoteric topic could be so interesting?
- *Deals from Hell, Bruner*. A compendium of failed M&A deal case studies, written by the former Dean of the Darden School of Business at UVa. It has been years since I've looked at this book, but my recollection is that some of it is worthwhile. In case you didn't already know, M&A is risky!

#### **Financial History and Banking**

- *House of Morgan, Chernow*. By the author of *Hamilton* (the book behind the musical), this is the story of the fabled House of Morgan, now known to you as JP Morgan and Morgan Stanley (but also the UK merchant bank Morgan Grenfell, now part of Deutsche Bank). The book is now decades out of date, but it offers an interesting perspective on American (even global) financial and corporate history. Chernow also wrote *The Warburgs*, about the UK banking house, which I recall enjoying when I read it 10+ years ago while working in London.
- *America's Bank, Lowenstein*. The story of the founding of the Federal Reserve, at a key time in US and global financial history. Central banks play an increasingly critical role in today's financial world, and central banking itself is way more interesting than you would probably guessed. Ignore this topic at your peril.

- *Lords of Finance, Ahamed*. The story of central banking during the Great Depression, and a reminder of the cataclysmic economic and human consequences caused by financial crises when central bankers get it wrong (as they did then).
- *Nation of Deadbeats, Nelson*. Written by (former) W&M history professor Scott Nelson, this is the story of how a series of financial crises influenced the development of America, particularly in the 19<sup>th</sup> century. Not particularly academic; good fun for history buffs.
- *Fragile by Design, Calomiris and Haber*. This is more of an academic work than most of my other recommendations, but I recommend it for students who want to understand better the development of the commercial banking industry in America and why our banking industry looks the way it does today. Recommended to me by the former President of the Richmond Fed (himself a financial economist).

### **The Great Financial Crisis (2008 edition)**

- *The Federal Reserve and the Financial Crisis, Bernanke*. This is the collection in book form of a series of lectures given by former Fed chair Bernanke to students at GW University shortly after the financial crisis. Those of you who have taken my financial services class will know this book.
- *The Alchemists, Irwin; In Fed We Trust, Wessel; and After the Music Stopped, Blinder*. These three books all focus on the role of central bankers during the Great Financial Crisis, from varying perspectives. Of the three, my recollection is that Blinder was the most insightful (he is a former Fed Vice-Chair) but they are all very good.
- *Fools Gold, Tett*. This is the story of how bankers at JPM developed credit default swaps, which played such a significant role during the Great Financial Crisis. Believe it or not, the book is really fun as well as being quite insightful. Author Tett is a financial journalist (now editor) at the Financial Times and she trained for covering the banking industry by studying cultural anthropology, which seems fitting.
- *When Genius Failed, Lowenstein*. This is the story of the spectacular rise and rapid collapse of the giant hedge fund, Long-Term Capital Management (LTCM), which was a precursor to the events of the Great Financial Crisis of 2008. The LTCM story should be well known to everyone working on Wall Street, but it sometimes seems like the lessons are too often forgotten even by those running (and regulating) our major financial institutions. The LTCM story is also a good reminder that “genius” can be overrated; sometimes good common sense along with a healthy dose of humility beats a high IQ and the arrogance that tends to go with it. Definitely another fun book. For a good companion read, check out Michael Lewis’ book *Liar’s Poker*, about the shenanigans going on at Salomon Brothers in the years before LTCM. (Many of the senior LTCM executives came from Salomon, and both firms subsequently failed. Coincidence?)
- *Too Big to Fail, Sorkin; and The Big Short, Lewis*. These are fun reads, but there are also great film versions if you want to save some time. Kudos to the authors and the film producers; who would have thought you could make fun books and movies about bank bailouts and sub-prime mortgages?

## Other

- *Against the Gods: The Remarkable Story of Risk, Bernstein.* This book truly is truly remarkable and everyone who has read it seems to agree. If you read only one book from my list, make it this one. Who knows, you might even begin to consider careers in the rapidly changing insurance industry (which I recommend by the way).

*The following are additional resources to consider as you prepare for careers in financial services.*

- Candid Careers: Featuring hundreds of videos, with people from all kinds of fields, [Candid Careers](#) is a great way to investigate various careers. Those who are unsure of their intended career path can learn what to expect from each, and how to prepare themselves for success.
- Focus 2: William & Mary students have access to [Focus 2](#), an online, self-paced career, education, and planning tool. Through Focus 2, you can take inventory of your work interests, skills, values, personality, and more as a way to make more informed career decisions. Each assessment in Focus 2 provides you with a description of your results, a sample of relevant career options, and academic majors aligning with each career option.
- Newsletters:
  - The Boehly Center sends Thursday emails with job, webinar and upcoming event information. In addition, the Boehly Center sends a monthly Newsletter summarizing the month's activities. To receive one or both of these items, please email [Boehly.Center@mason.wm.edu](mailto:Boehly.Center@mason.wm.edu).
  - The Cohen Career Center provides a variety of industry specific newsletters to keep tabs on workshops, internships, jobs, and more. To subscribe to an industry newsletter, you will first log in to your [TribeCareers](#) profile. Then, go to "My Account" > "Academic" and scroll until you find the "Industry Newsletters" checkbox list. Check off the newsletters you want to receive, save the changes, and you're good to go!
- Glassdoor: Create a free account using your W&M email address. Features salaries, company interview questions, reviews and job descriptions/functions.
- Vault Guides: access to new jobs, internships, interview questions, industry knowledge and career guides: <https://access.vault.com/career-insider-login?aid=148324%20>
- Wellness Center: An important part of going through career readiness and recruiting is your mental health! It can be stressful but if you are not healthy and ready than you will not present yourself to the best of your ability. Therefore, if you find you are needing support, W&M's Wellness Center offers various virtual fitness classes, mindfulness tools, and tips to relieve stress. Check out their incredible resources here: [Virtual Health & Wellness at W&M](#).

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