



EAB

Student Success Collaborative

Developing Proactive Outreach Plans

Toolkit for Faculty and Staff Academic Advisors



Table of Contents

About This Toolkit	3
Overview of a Proactive Outreach Plan.	4
Creating a Proactive Outreach Plan	5
Sample Proactive Outreach Plan	6
Template Proactive Outreach Plan	7
Sample Student Emails	8
Appendix: Technical Instructions.	11

About This Toolkit

**Do you want to help students navigate advising and avoid common pitfalls?
Frustrated by students' lack of knowledge and ill-preparation for meetings?**

Today's Lesson: Proactive Outreach Plans

Proactive outreach plans enable academic advisors to direct focus to specific populations of students in need of supplemental attention. By putting singular attention on the students who they can help the most with actionable next steps, advisors are able to maximize the overall impacts of their efforts.

Navigate makes it easier to execute your proactive outreach plan with a suite of tools (analytics, workflow, and student engagement) for quickly identifying, contacting, and meeting with students.

This toolkit is essential to create and run a successful proactive outreach plan. Please contact your Dedicated Consultant with any questions.

Academic Advisors use Proactive Outreach plans to...



Impact student success by identifying and reaching students



Focus limited advisor time on manageable groups of students



Efficiently channel targeted outreach

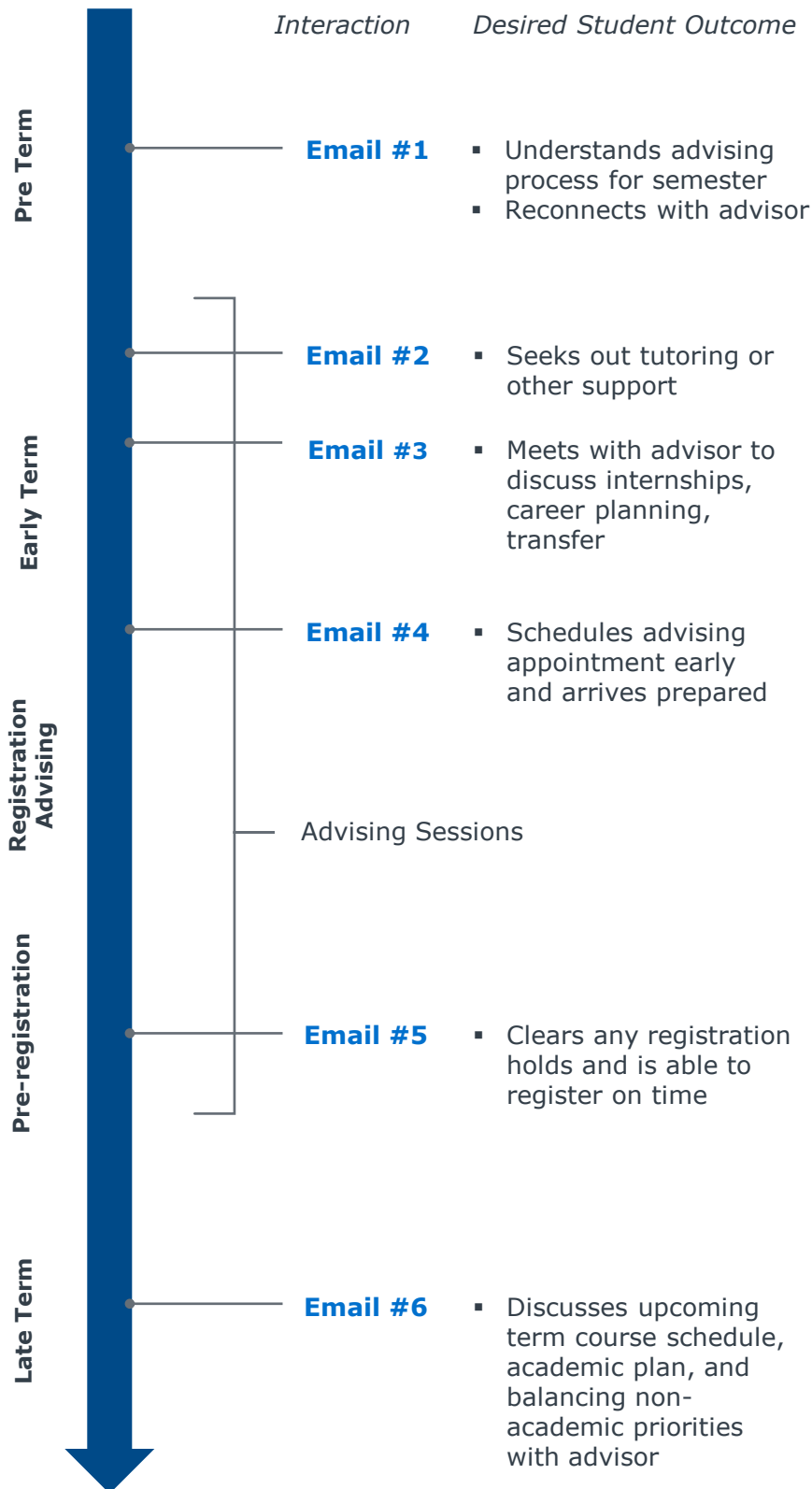
Note to Members

This toolkit is intended for Navigate members who have implemented the Advisor View function within the Navigate platform.

If you are ready to create a full-scale campaign based on your proactive outreach plans, check out our "Designing and Implementing a Targeted Advising Campaign Toolkit" available for download at eab.com.

Overview of a Proactive Outreach Plan

Recommended Approach to Student Communication



Academic Advisor Goals:

- Send personalized emails at determined frequency
- Align the content of the emails to specific student steps so students will follow through on the advice
- Encourage students to take advantage of existing supports, resources, and opportunities
- Identify the next steps you will take to follow up with these students to ensure the impact of your outreach

Student Benefits:

- ☑ Improves student awareness and preparation for advising
- ☑ Deters students from common pitfalls (e.g., holds, failure to get PIN)
- ☑ Increases students seeking advisor support for long-term academic and career planning
- ☑ Builds advisor-student relationships and improves the student experience

Creating a Proactive Outreach Plan

Five Steps to Start with Tips from Advisors

- 1. Set aside dedicated time** during your regular planning period for the upcoming term to strategize and prepare for your proactive outreach to students.
- 2. Decide on your outreach approach.** Use the template outreach schedule on p. 7 of this toolkit to:
 - Decide how much email outreach you want to send
 - Determine the timing, student group, and content for each piece of outreach
- 3. Create your email templates.** Review the sample student emails on p. 8 -11 of this toolkit as inspiration, or to customize for your use. We recommend that you create the stock emails you will send at the beginning of the term, so they are ready to go when you need them throughout the term.
- 4. Set calendar reminders.** Block off time when you plan to send each round of outreach.
- 5. Execute on your plan.** Export appropriate work and watch lists from Navigate (see Appendix, p. 11) and use mail merge to send your template emails to their intended audiences as needed.

► Pro Tips From Faculty Advisors

Best Practices for Effective Messaging



Simplify Student Email Outreach

Identify opportunities to practice efficiency

- “With Navigate work and watch list exportation and mail merge, sending emails to your student is easier and scalable. One student or 100 makes little difference.”
- “If you plan to track outcomes or require students to come in for additional appointments, try targeting no more than 30 students.”



Specify the Student Action

Direct students to available resources

- “While some proactive emails may be general in nature (e.g., reminding your students who you are), most messages should contain specific, concrete action steps that students need to take (e.g., clear holds, seek supplemental instruction, course scheduling, transfer requirements).”



Build Trust with Students

Establish rapport by personalization

- “Academic advisors report that personalized emails make students feel supported by their institution.”
- “Utilize your work and watch lists and your native email system’s mail merge functionality to send emails that address the student and their needs.”



Use Direct and Concrete Language

Empower the student to move forward

- “Direct language elicits the highest response rate from students.”
- “If you want a student to come in for an appointment, use “Please schedule an appointment with me next week,” rather than “I would be happy to speak with you sometime next week.”

Sample Proactive Outreach Plan

Any Academic Term

Timing	Student Group	Email Content	Purpose	Navigate List Filters
One month before the start of the semester	Students not yet enrolled for upcoming term	Reminder that registration is open and classes are filling up quickly. Schedule an advising appointment if you have questions about what courses you should take.	Engage and enroll students; encourage students to seek advice	Not enrolled for current term
First week of the semester	All students	Welcome back; general advising instructions; invitation to come in at any point throughout semester	Increase general advising awareness and build advisor-student relationship	Advising group
First half of term	Students in need of academic support or other services	Invitation to come in and discuss strategies for successful term; reminder of resources available	Improve course performance	GPA below a certain threshold
First half of term	Mid and high-performing students	Invitation to come in and discuss long-term planning, internships, extension activities, career planning	Improve student experience and post-graduation outcomes	GPA above a certain threshold
Before registration	All students	Invitation to come in and discuss upcoming courses as well as long-term planning; reminder of # of notifications and invitation to discuss fulfilling success marker courses	Bolster term-over-term retention by meeting with students about planning academic courses	Advising group or students with 0 planned courses for upcoming term
Before the end of the current semester, after registration is open	Students that have 0 registered courses for the upcoming term	Invitation to come in and discuss upcoming term registration, select from available courses/sections to optimize academic plan	Prevent unnecessary stop/drop out	Not enrolled for upcoming term
Before the end of the semester	Students seeking to transfer	Invite students to schedule appointments to discuss transfer plan and confirm all transfer requirements are fulfilled or planned	Speed and streamline student path to transfer	Completed 45 credits or more and stated 'Transfer to four-year institution' as goal

Template Proactive Outreach Plan

Academic Term: _____ Year: _____

Timing	Student Group	Email Content	Purpose	Navigate List Filters

Sample Student Emails

▶ Student Who Missed Registration Deadline

Subject: Is there a reason you have not yet registered for classes?

<FirstName>,

Your registration window closes **<date> (tomorrow)** at 11:00 am. Don't delay and register for classes! To have the best opportunity to get the classes you want, you need to [register before the window closes](#) <insert Navigate link>.

If you are not able to complete your scheduling by 11:00 am tomorrow, you will have to wait until **<insert date and time window>** and you are less likely to get the schedule you want.

If you need assistance, please let me know.

▶ Student Struggling to Meet GPA Requirements for His/Her Major

Subject: URGENT – Chemistry Plans

Hi <FirstName>,

I am writing to follow up about an email I sent a week ago.

Most science-related industries generally look for students with a 2.8 GPA or higher. I noticed that you currently have a **<Cumulative GPA >2.5>**. I would like to meet with you in person to discuss your goals and create action steps together.

Please use this link <insert link to Navigate> before Wednesday, <date>, to schedule an appointment during the week of <date>.

If you have decided to switch majors, please respond to this email and let me know so that I can work with you to ensure that the department does not put an advising hold on your account.

Sample Student Emails (CONTINUED)

▶ Student Seeking Admission into a Selective Program, Needs Support

Subject: You qualify for our new program!

Dear <FirstName>,

Welcome back! We hope that you had an amazing summer and that you are rested up and ready to start the fall <year> semester.

As you know, the nursing program has a competitive admissions process. The average cumulative GPA for students accepted to the nursing program has been **3.7 and above, and** your cumulative GPA is currently <GPA 3.0 to 3.5>, contact us so we can assist you.

[Use this link to schedule a program appointment](#) <insert Navigate link> or respond to attend one of the office hours listed below.

▶ Student Who Made a Successful Major Change

Subject: Excited for your new journey!

Hi <FirstName>,

I noticed that you successfully changed your major from Nursing to Business Administration. Congratulations!

As we discussed, I think this major is a great fit for you based on your interest in small business and local industry issues, and your solid performance in your business classes to date.

Are you familiar with the [career services office](#)? I recommend you visit them to learn more about opportunities in the field of Business Administration. If you are interested, **let me know before the end of <date> and I can put you in touch with one of my colleagues who is a career counselor there.**

Sample Student Emails (CONTINUED)

▶ Student Seeking to Transfer to a Four-Year Institution

Subject: Prepare for your transfer!

Dear <FirstName>,

Welcome back! We hope that you had an amazing summer and that you are rested up and ready to start the fall <year> semester.

As you know, you are nearing the end of your associates program at <community college name>. Connect me in the next week to schedule an appointment to go over your transfer credits and materials.

[Use this link to schedule a program appointment](#) <insert link to Navigate> or respond to attend one of the office hours listed below.

▶ Student With a Financial Hold

Subject: Do you need help clearing your hold?

Dear <FirstName>,

As you know, we are nearing the end of the semester and the enrollment period for the upcoming semester will be here soon. However due to your hold, you will be unable to enroll in your classes, and may risk not getting in the classes you need.

To avoid that we would like to connect with you this week to determine what help you may need to get the hold off your record.

[Use this link to schedule a program appointment](#) <insert link to Navigate> or call 000-000-0000.



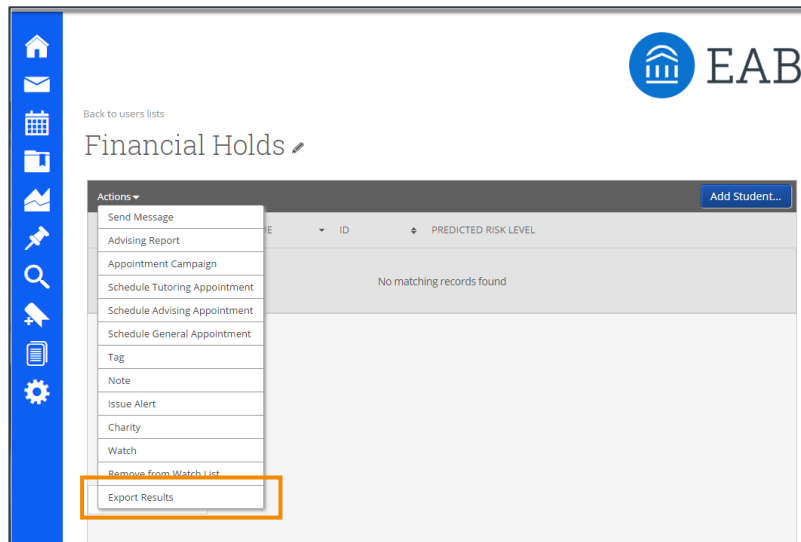
Technical Instructions

How to Export Your Student List within Navigate

APPENDIX

Exporting Work and Watch Lists

Users can export work and watch lists. To do this, under Lists and Searches, click into your list, select "Actions" and choose "Export Results". Extensive student information is included making this feature helpful for large-scale outreach campaigns.



A maximum of 2000 students may be exported at a time; your institution will set the limit. If there are more than the permitted number of students in your list, the Export List to CSV link will not work. The number of students that may be exported at one time is limited to avoid slow response time.

Tip: If you need to export more than a few thousand students, use the last name filter to break the list up alphabetically, then merge the lists after export.

Performing a Mail Merge Using an Exported List and Outlook

(for in-depth instructions, consult Microsoft's website)

Create a template email in a word document, including placeholders in chevrons (e.g., «STUDENT FIRST NAME») that indicate where the unique student information will appear in each copy of your email. If you use the column titles from your excel worksheet, you will not need to map placeholders to column titles.

1. In the Mailings tab, select Start Mail Merge > Email Message
2. To connect the email message to your Navigate work list, select Select Recipients > Use Existing List. Browse to find the saved excel document on your computer, select the correct tab (if applicable), and click OK
 - Note: You may not notice any changes, but if you are now able to click on Edit Recipient List, then the connection was successful
 - If you only want to email a portion of your Navigate work list, use Edit Recipient List to exclude specific students
3. For each placeholder in your message, highlight the placeholder and select Insert Merge Field > Database Fields > the column of information you want to use > Insert > Close
4. Preview your messages to make sure the personalized details appear correctly for each student
5. Select Finish and Merge > Send Email Messages. At this point you will be asked for the data field/column in your excel spreadsheet that contains the email addresses of your students and for a subject line for the email. Choose something attention grabbing and click OK.

The best
practices are
the ones that
work for **you.**SM



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