



EAB

Navigate

Got Mail? How to Survive Peak Advising Season

Best practices for managing your caseload with Navigate

Navigating GoToWebinar



Managing Your Audio and Screen

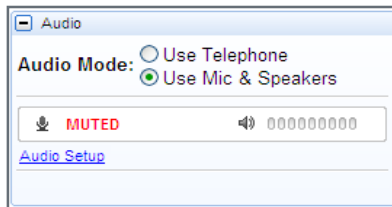
Using Your Telephone

If you select the "Use Telephone" option, please dial in with the phone number and access code provided.



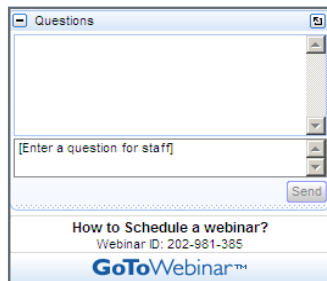
Using Your Microphone and Speakers

If you select the "Use Mic & Speakers" option, please be sure that your speakers or headphones are connected.



Asking a Question

To ask the presenter a question, type it into the question panel and press send.



Minimizing and Maximizing Your Screen



- Use the orange and white arrow to minimize and maximize the GoToMeeting panel.
- Use the blue and white square to make the presentation full screen.

Today's Presenters



Meacie Fairfax
Senior Analyst

MFairfax@eab.com

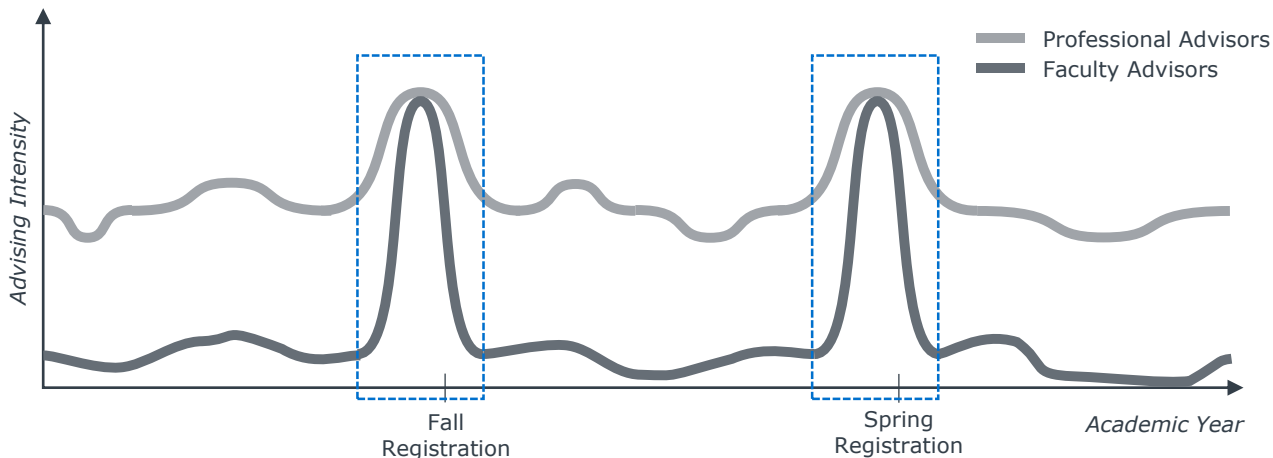


Bernard Laryea
Director

BLaryea@eab.com

The Nature of Advising Workloads

Appointments Tend to Peak Just Before Fall and Spring Registration Periods



What Characterizes the Peaks?

- Multiple appointments each day
- Increased need for registration or intervention
- Peaks even more dramatic for many faculty advisors, who experience a rush and need for their time and support when it isn't readily available

- 1 Mastering Inbox Essentials
 - 2 Examining and Improving Standard Processes
 - 3 Creating Capacity with Proactive Campaign Calendaring
-

Start with Your Desktop

Quick Efficiency Tips to Increase Your Time

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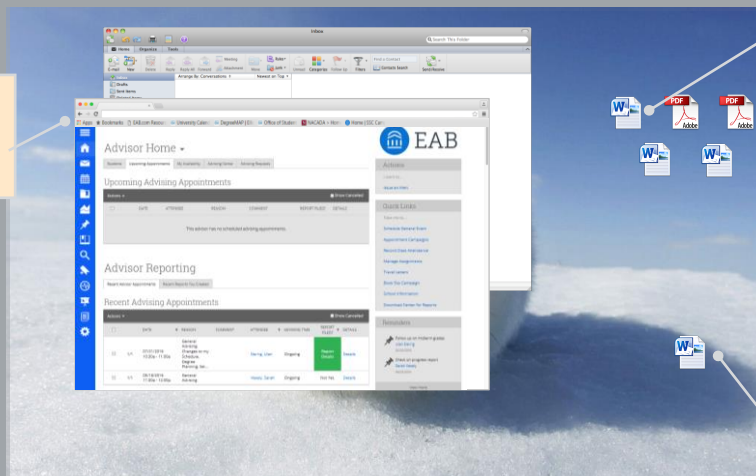
Bookmark websites you frequently use with advisees

2

Save **key student handouts and forms** on your desktop for easy dragging-and-dropping into email

3

Save a word document with **common email replies and answers to frequently-asked questions.** Copy and paste into emails to save time.



Put Your Signature to Work

Automatic Email Signatures Can Answer Questions So You Don't Have to

Provide Helpful Links and Resources

Sample

Jim Nguyen
Success Coach

Vanguard Community College Student Success Center
4455 Main Street. [Find on a campus map.](#)
(202) 555-5555
[Schedule an appointment.](#)



Important Links

Academic Calendar: www.vcc.academiccalendar.edu
Advising Calendar Dates: www.vcc.edu/dates
Academic Standing: www.vcc.edu/academicregulations
Advising Policies and Procedures:
www.catalogue.vcc.edu/policies
Advising Syllabus: www.catalogue.vcc.edu/advising

Highlight Timely Critical Information

Sample

Best,

Deborah Wright

Vanguard Community College Student Success Center
Gregory Hall, 503
Office: (202) 555-5555
Direct: (202) 555-5555

What to know for Fall 2017 Registration (CURRENT STUDENTS):

- 1) **Placement Exams-** If you need to take the math placement exam, keep checking your email as more instructions will follow in the next 1-2 weeks. For questions, call (202) 555-5555.
- 2) **Your Registration Window-**Registration windows are determined by standing: www.vcc.edu/reg.
- 3) **Registration Issues-** If you are trying to register and have a hold on your account or have a status error, please call the office of the registrar at (202) 555-5550 and request a status change. If you are getting a registration error or restriction, please call the department of that class.

Options for Automation at Your Fingertips

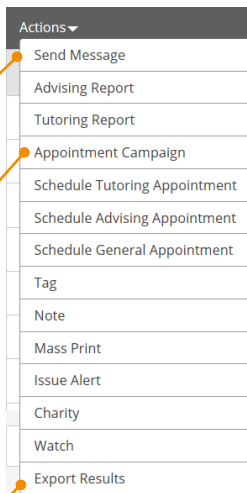
Mass Actions and Mail Merge Are an Advisor's Best Friends

Navigate Actions

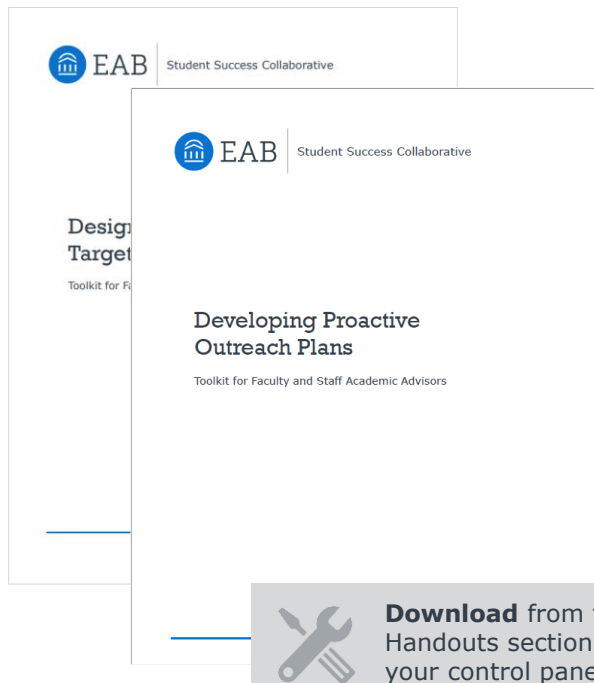
Sync Outlook Emails

Create Multiple Campaigns

Export List Results



To Send Highly Personalized Mass Messages, Export and Use Mail Merge!



Sample Advisor Emails

Answer Common Questions En Masse

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

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▶ **Student Who Missed Registration Deadline**

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▶ **Student Seeking to Transfer to a Four-Year Institution**

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▶ **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.

Be An Inbox Ninja



10

HOW TO BE AN Inbox Ninja

REDUCE VOLUME

When you can, **UNSUBSCRIBE**

Set up **RULES...**
From Blog → "Read later" folder
From Manager → "High-importance" folder

...and **ALERTS**
Auto-flag → Emails from external/import clients
Auto-delete → When you can't (or won't) unsubscribe

DON'T REPLY ALL
Consideration: reply should be to someone

Set up a meeting for us to discuss
Thank
Thank you
Talk to my boss
See you there

REDUCE COGNITIVE LOAD

Starting a thread of replies around nothing right is crucial

FOCUS on newest messages

Determine your "FOLLOW-UP" STRATEGY

- Use a follow-up folder
Clear definition of next step
See list of immediate action
- Flag email
See specific and easy to find new folders above
- Move to "tasks"
See others for categorization
See list of immediate action
- Leave in your inbox
See flag folder
See folders below

CAPTURE ATTENTION

Know your intention **before** you hit send

Intention: Is your email to **INFORM** or **REQUEST**?
Recipient should read → Your email should **inform**
Recipient should care for later → Your email should **inform**
Recipient should reply → Your email should **request**
Recipient should act → Your email should **request**

How you deliver your message will help shape your recipient's response

LIMIT & USE SEARCH

COMMUNICATE CLEARLY

Place your **NAME** names

NAME	Team	all
LINE	everyone	Mr. Nemo
UP	soon	set times
FRONT	at some point	at some point
	when free	on the 15th

Consider the HOUR

TARGET YOUR SUBJECT LINE

Keep your message **SHORT**

Know when NOT to email

EMPLOY FORMATTING

- Bullet → For listing tasks and instructions
- List → To create shorter paragraphs
- Block → Names and deadlines
- Table → To call attention to
- Text Box → To differentiate
- Hyperlink → For convenience

The Advisory Board Company

Watch the full webinar on advisory.com/webinars

©2017 Handouts from The Advisory Board Company

Inspired by the Advisory Board Company's **Infographic** and Merlin Mann's 'Inbox Zero' Series

Two Categories Most Relevant to Advisors:

1. Reduce Volume
2. Reduce Cognitive Load



Download from the Handouts section of your control panel

Defend Your Inbox

Unsubscribe or Create Rules to Reduce the Number of Incoming Emails

If You'll Never Want to Read It, Unsubscribe

15%

of "deleted items" are from senders you should unsubscribe from

Would you ever want to read an email from this sender? If not, are they going to keep emailing you anyway? Unsubscribe.

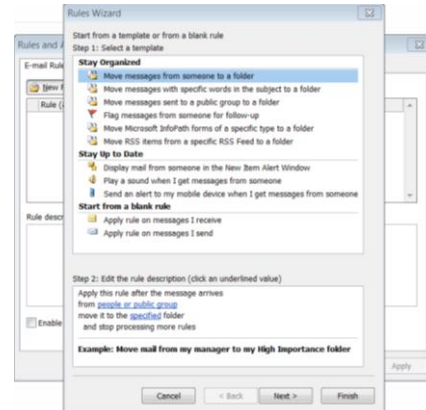


If You Can't or Don't Want to Unsubscribe, Use "Rules"

Examples of Automated Email Rules:

- Send professional newsletters to a "read later" folder
- Send manager's emails to a high-importance folder
- Flag emails from important people (or format differently)
- Automatically delete something you can't (or won't) unsubscribe from

Click File > Manage Rules & Alerts > New Rule

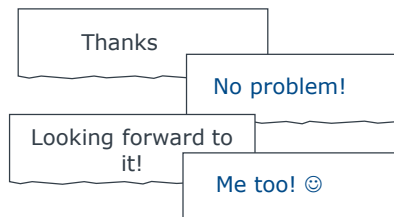


End-of-Thread Dilemma

Be Conscious of “Reply” to Prevent Needless Back and Forth

The “Polite Reply” Trap

I set up a meeting for us to discuss.



1 communication, 5 emails

The “Reply All” Risk

I set up a meeting for us to discuss.



1 communication, 5 emails

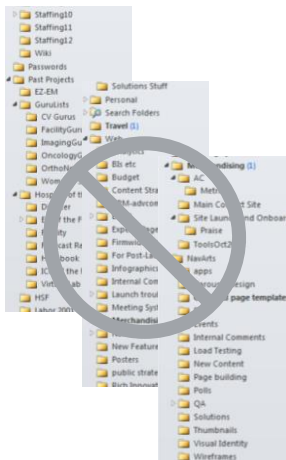


Does your email communicate anything other than acknowledgment?
If not, send it to as few people as possible—or no one at all.

Taming the Beast

Choose an Inbox Management Strategy That Works for You

Don't Become a Folder Addict!



Two Inbox Management Strategies

Items: 0

Inbox Zero

- Keep as few items in your inbox as possible
- Archive messages you don't need to act on again in a single "Archive" older
- Delete messages you've evaluated and don't need
- Only retain messages you will need later

Items: 18,101

Inbox Unlimited

- Delete only junk mail
- Respond to relevant messages in the moment
- Use the search function to find old messages later

Filing and sorting is often inefficient and time consuming.

There are several different viable ways of managing your email; pick one that works and stick to it.

Act (Once) on All Emails

Tackle Newest Messages First—"Last In, First Out"

5 Acceptable Actions for Email from 'Inbox Zero' System



Delete

If no action is required, delete it or put it in your archive folder



Delegate

If someone else can respond, forward it to them



Respond

If you can respond in two minutes or less, do so



Do

If you can act on the email in two minutes less, do so



Defer

If acting or responding would take more than two minutes, flag for follow-up

Figure Out Your 'Flag for Follow Up' Trick

4 Options to Save Emails for Future Use

	Follow-Up Folder	Move to "Tasks"	Flag Email	Leave in Inbox
Pros	Clear delineation of next step	Allows for additional categorization	Specific and easy to find	Easy to find
Cons	Out of immediate site	Requires checking an addition app	Clutters inbox	Clutters inbox

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Mastering Inbox Essentials

2

Examining and Improving Standard Processes

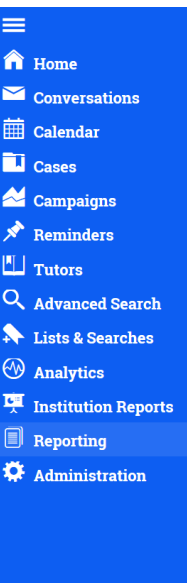
3

Creating Capacity with Proactive Campaign Calendaring

Start with Data



Advisor Reports Can Reveal Trends to Help You Better Manage Intake



Available Reports (Dependent on Data)

Advisor Reports

Advisor Appointments

Advisor Appointment Details

Students With/Without Advising Appointments

Advisor Summaries

Advisor Detail Summaries

Advisor Reason Totals

Daily Advisor Appointments

Advisor Activity Report

Advisor Cancellations

Advisor No-Shows

Advisor Stats

Advisor Conversations Stats

Advising Request Report

Advisor Availabilities

Trend

High number of walk-ins across a given week

Unexpected appointment "Reasons" during given time periods, ex:

- "Change Major" appointments during peak registration time
- "Financial Aid Advising" appointments after aid deadline

High number of no-shows or cancellations at a specific time, ex. 9am to 10am

Possible Solution

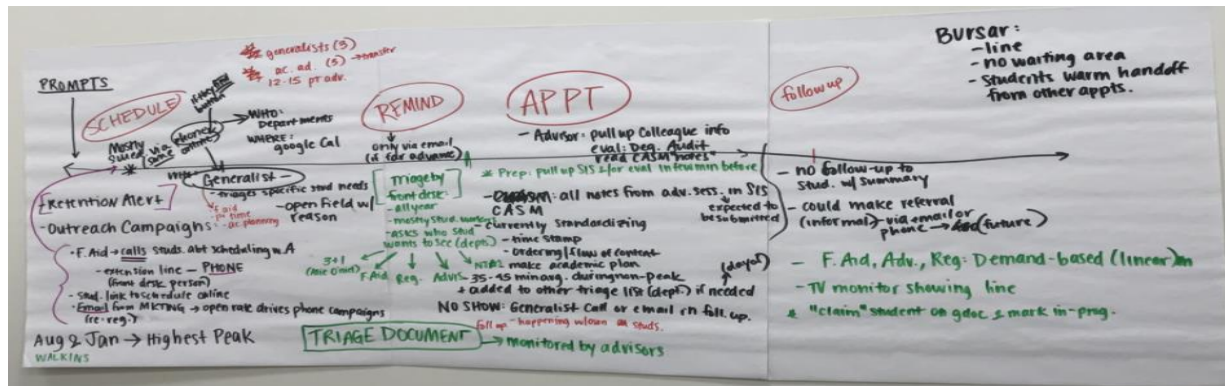
Set up an appointment campaign to encourage students to schedule in advanced

Provide targeted information via email to proactively answer questions; use proactive campaigns to meet with students at better times

Block off your calendar or adjust your availability; use that time for work other than appointments

Map Your Appointment Workflow

Detail Your Process to Improve Your Efficiency



Improve Your Appointment Processes

- Determine what you can automate or eliminate
- Provide students with forms or work prior to appointment



Standardize Your Approach to Referrals

- Agree on a standard process across departments to reduce and save time



Appointment Tip

Schedule 25-minute student appointments. Block the remaining 5 minutes for follow-up, notes, and referrals.

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Mastering Inbox Essentials

2

Examining and Improving Standard Processes

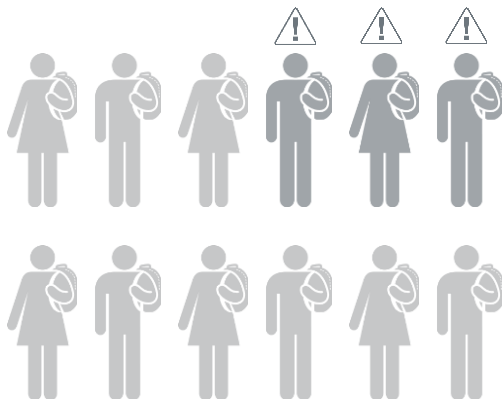
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Creating Capacity with Proactive Campaign Calendaring

Expanding How You Think About Campaigns



What Is a Campaign? Focusing outreach and advising efforts on a subpopulation with a shared academic factor and clear intervention path



How It Works



Use advanced search to focus on specific lists of students



Send outreach (via email, text, or appointment campaign)



Meet with students, discuss struggles, and develop plans



Identify, escalate, and resolve common root cause issues



By changing one variable—*timing*—you can use campaigns to even out your capacity



One Advisor's Major Declaration Campaign

Proactively Approaching Students to Guide Smart, Early Major Choices

Adviser Overload



- Inability to provide one-on-one sessions to all students
- Group advising sessions can cover only basic topics

Worklist Creation



- Undeclared
- GPA >2.0
- >30 credits
- Currently enrolled

Campaign Results



41

Students to initially target

Key Successes in Targeting Student Outreach



Segmentation of Outreach

- Individualized attention for students to discuss options
- Provide major-specific guidance which is often overshadowed by to-do's



On-time Outreach to Students

- 61% of students declared a major before registration
- 8 students were identified as needing additional support

Other Campaign Ideas to Level Out Capacity

Advisors Investing Time in Off-Peak Campaigns to Save Time Later

Attributes of a Great Campaign

Determine the Desired Action

- Pull forward time-sensitive conversations or tasks
- Improve students' standing
- Help students declare a major



Sample Student Campaigns

Potential Populations to Consider



Students with majors that do not match ideal program



Students with excessive credits



"Stop outs" that could return and graduate easily



Students with work/life balance issues



Got innovative targeted advising campaigns? Send them to us or our your Dedicated consultant and we will share them with the broader Collaborative!

Putting Together Your Campaign Calendar

Identify Open Capacity Across the Semester

September						
Su	Mo	Tu	We	Th	Fr	Sa
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

October						
Su	Mo	Tu	We	Th	Fr	Sa
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

November						
Su	Mo	Tu	We	Th	Fr	Sa
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Putting Together Your Campaign Calendar

Identify Open Capacity Across the Semester

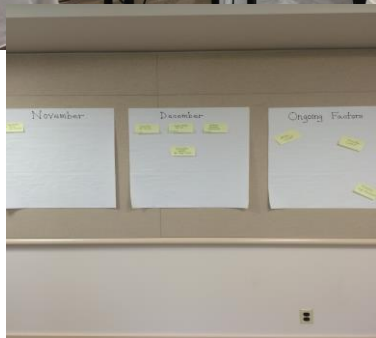
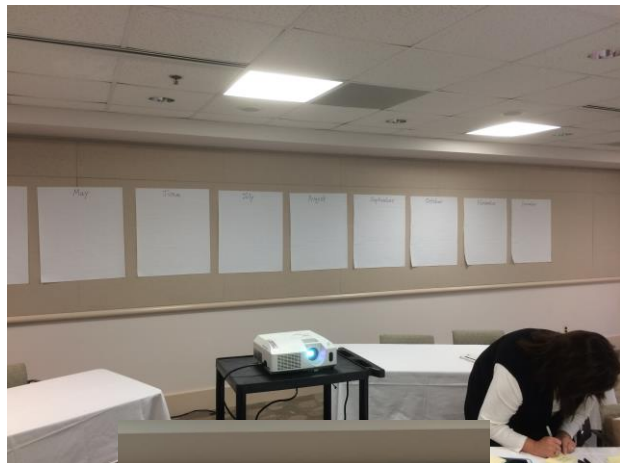
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31						

What If Campaigns Went College-Wide?

Departments Coming Together to Build Campus-Wide Campaign Calendars





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Director

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Bringing Guided Pathways to Life

Nearly every college leader has heard of Guided Pathways. And while the vast majority of leaders agree their students would benefit from smooth pathways to graduation, the outstanding question is *how*. In this popular webconference, we discuss the history of Guided Pathways, its main elements, and how a combination of research and the Navigate technology can be used to bring the model to life.

Thursday, October 12

2:00 p.m. – 3:00 p.m. Eastern

Presenter: Meacie Fairfax



Virtual Member Discussion Panel

We are pleased to offer Navigate members an opportunity to discuss common challenges, share promising practices, and learn from our growing network of progressive leaders. Join us for our first virtual member panel, where leaders from EAB colleges will discuss, debate, and answer questions about a range of topics including university transfer, new student communication, and curricular redesign.

Thursday, November 30

2:00 p.m. – 3:00 p.m. Eastern

Facilitator: Bernard Laryea

Please Fill Out the Exit Survey!



- As you exit the webinar, you will be directed to an evaluation that will automatically load in your web browser.
- Please take a minute to provide your thoughts on the presentation.

THANK YOU!

Please note that the survey does not apply to webconferences viewed on demand.



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