



EAB

Student Success Collaborative™
Campus

How to Thrive During Peak Advising Times

Best practices for managing your caseload with SSC–Campus

Navigating GoToWebinar



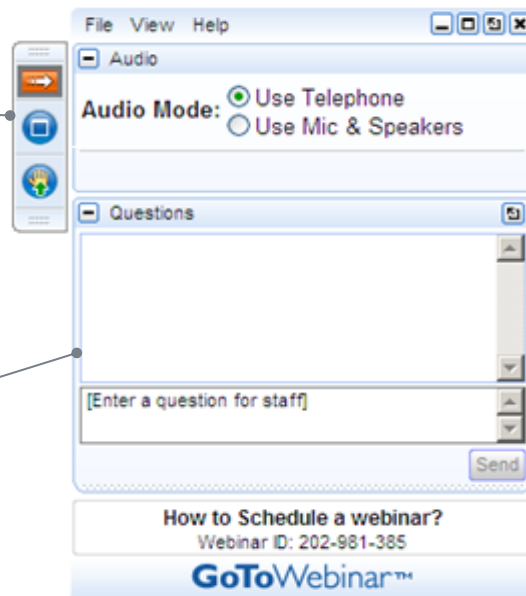
Basic Logistics

Click the orange button to hide or show the control panel.

Click the blue button to make the presentation full screen.

To Participate

Enter other questions or comments in the question box and click "Send."



Today's Presenters



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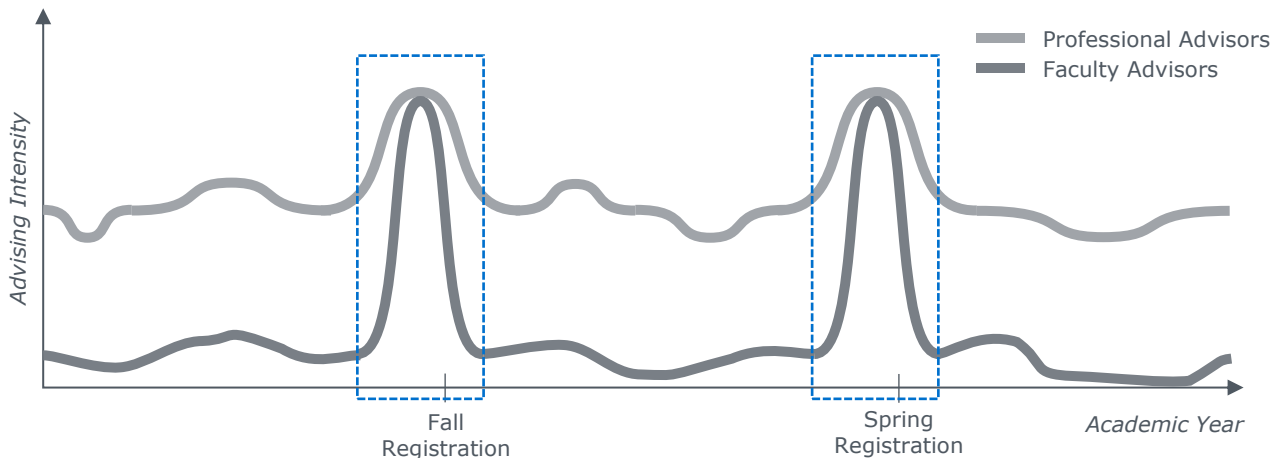


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The Nature of Advising Workloads

Appointments Tend to Peak Just Before Fall and Spring Registration Periods



What Characterizes the Peaks?

- Multiple hours of appointments every day, 15–30 minute sessions
- Focused on course registration or reactive intervention
- Less rewarding as there is little time for meaningful conversations
- Peaks even more dramatic for many faculty advisors, who experience long “valleys” in between



- 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 Save Time Year Round

1

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

John Lin

Success Coach

Whitehurst University Success Center

4455 East State Street. [Find on a campus map.](#)

(202)555-5555

[Schedule an appointment.](#)



Important Links

Academic Calendar: www.whitehurst.academiccalendar.edu

Advising Calendar Dates: www.whitehurst/dates

Academic Standing: www.whitehurst.edu/academicregulations

Advising Policies and Procedures:

www.catalogue.whitehurst.edu/policies

Advising Syllabus: www.catalogue.whitehurst.edu/advising

Highlight Timely Critical Information

Sample

Best,

Amy Smith

Whitehurst Advisement Center

Jefferson Hall, 503

Office: (202) 555-5555

Direct: (202) 555-5555

What to know for Fall 2016 Registration (CURRENT STUDENTS):

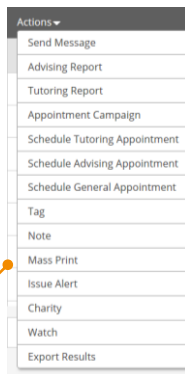
- 1) **Placement Exams-** If you need to take the math placement exam, keep checking your email as more instructions will follow in the next 1-2 weeks. For questions, call (202) 555-5555.
- 2) **Your Registration Window-**Registration windows are determined by class and standing: www.whitehurst.edu/reg.
- 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) 555-5555 and request a status change. If you are getting a registration error or restriction, please call the department of that class.
- 4) **Dropping a Class-** Follow this link and enter your Registration PIN: https://www.whitehurst.edu/reg/calendar_login.

Options for Automation at Your Fingertips

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

What SSC–Campus Automates

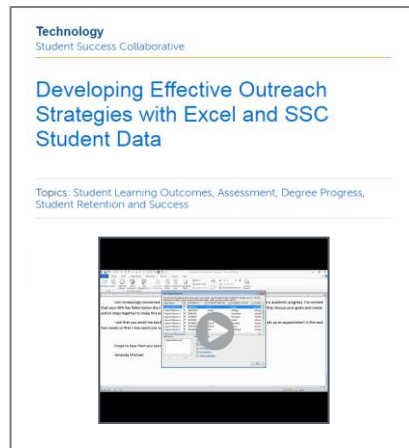
- Syncs with Outlook if integration has taken place, so you can track at all email threads in one place
- Sends automatic appointment reminders
- Actions: Variety of mass operations you can perform for all students in a given list



"If we set [things up] correctly, Campus becomes the "manager" freeing the advisor to focus on the important aspects of advising...As one advisor said, "this is the first time I didn't cry during spring registration and I am completely caught up on my notes."

University of Northern Colorado

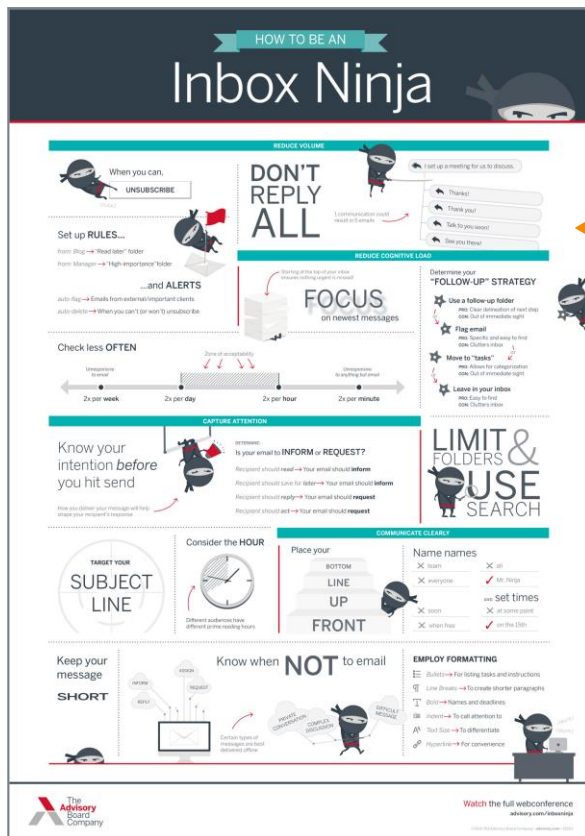
To Send Highly Personalized Mass Messages, Export and Use Mail Merge!



Step-by-Step Instructions in Archived Webinar:

<https://www.eab.com/technology/student-success-collaborative/events/webconferences/2014/developing-effective-outreach-strategies-with-excel-and-ssc-student-data>

How to Become an Inbox Ninja



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



Full Infographic Available in the Handouts Section of Your Control Panel



Watch the full webinar
advisory.com/webinars

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Playing Defense

Unsubscribe or Use 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.

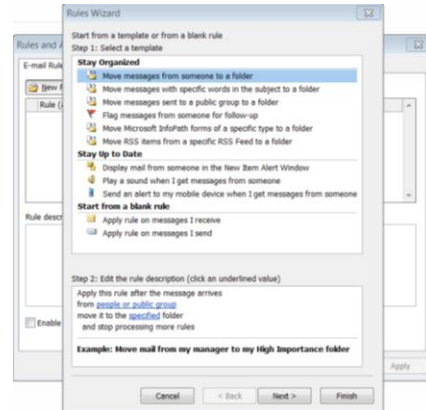
?

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



Email Begets More Email

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

The “Polite Reply” Trap

I set up a meeting for us to discuss.

- Thanks!
 - No problem!
 - Looking forward to it.
 - Me too 😊

1 communication, 5 emails

The “Reply All” Risk

I set up a meeting for us to discuss.

- Thanks!
- Thanks!
- Thanks!
- Thanks!

1 communication, 5 emails

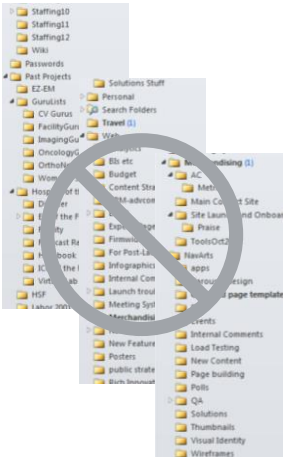


Does your email communicate anything other than acknowledgment?
If not, send it to as few people as possible—or no one at all.

Taming the Beast

Find 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

1

Mastering Inbox Essentials

2

Examining and Improving Standard Processes

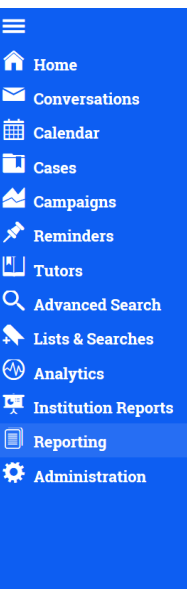
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Creating Capacity with Proactive Campaign Calendaring

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

Example Trend

High number of walk-ins across a given week, mostly high-risk students

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 high-risk 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

Advising Workflow Poster Can Serve as an Auditing Exercise and Reference



Student Success Collaborative
Campus

Where Do I...?

Making Contact

- See a list of all currently enrolled advisees SAC-Campus
- Identify students to proactively contact (or targeted campaigns) SAC-Campus
- Create lists of students SAC-Campus
- Email individuals or groups of students SAC-Campus
- Track outreach and responses SAC-Campus
- Schedule student appointments SAC-Campus

Getting Up to Speed On a Student (The Student Snapshot)

- View general student information (e.g., contact information, age, student ID, name, year) SAC-Campus
- Check a student's academic standing SIS
- Perform a degree audit and check a student's coursework against graduation requirements Degree Works
- Review a student's predicted risk SAC-Campus
- Review a student's institutional academic record (e.g., coursework, grades, GPA) SAC-Campus
- See if a student is completing critical courses on time SAC-Campus, Degree Works
- Review a student's academic trends (e.g., GPA, credit accumulation) SAC-Campus
- Review a student's pre-college academic record, including AP/IB, transfer status and coursework, test scores, and high school GPA SAC-Campus
- Review previous advisor-student interactions and notes SAC-Campus
- Identify any holds on a student's account SIS

Tracking Advising Interactions

- Log interactions with advisees SAC-Campus
- Create and manage advising notes SAC-Campus
- Send communications to and about students SAC-Campus
- Set reminders for future interactions with students or follow-up activities SAC-Campus

Advising Technology Workflows at
Whitehurst University

Advising Conversations and Activities

- Helping struggling students
 - Connect students to academic and non-academic support resources, make referrals Website
 - Review student financial data (e.g., aid amount, aid type, work-study) participation, on-campus employment SIS
 - Calculate a student's GPA or "what if" GPA for future coursework None

Course Selection

- Review recommended courses based on degree requirements Degree Works
- Review recommended courses based on degree milestones/success markers SAC-Campus
- Review recommended courses based on predicted difficulty SAC-Campus
- Review course and seat availability SIS
- Check for completion of prerequisite coursework SIS
- Create a potential course schedule SIS

Degree Auditing and Multi-Year Academic Planning

- Review graduation requirements Website
- Audit completed coursework for attribution of degree requirements Degree Works
- Create a four-year academic plan None

Registration

- Create student registration PINs, authorize registration, place or remove student holds, approve student schedule, etc. SIS

Major Declaration or Reconsideration

- Review a student's current major and previous major changes SAC-Campus
- Review potential major admissions and graduation criteria Website
- Explore alignment of potential majors with student skills/aptitude SAC-Campus
- Explore the impact of potential majors on degree progress through a "what if" degree audit Degree Works
- Explore career information for majors of interest SAC-Campus



Poster Template Available in the Handouts Section of Your Control Panel



Improve Your Appointment Processes:

- What are you doing inefficiently or inconsistently? (ex. Do you have a standard pre-appointment check-list? A standard process for follow-up?)
- What could you automate or eliminate? (ex. Are you still sending appointment reminders manually?)
- What can you do earlier or later? (ex. Do you prepare standard forms or assign students pre-work in advanced?)



Standardize Your Approach to Referrals:

- When a student has a problem that you can't solve for them, know your policy to refer them to another office, and how to track it
- Reach out to the relevant office to agree on a standard process that will save you both time

Tip: Schedule 25-minute student appointments and block the remaining 5 minutes for follow-up, notes, and referrals



1

Mastering Inbox Essentials

2

Examining and Improving Standard Processes

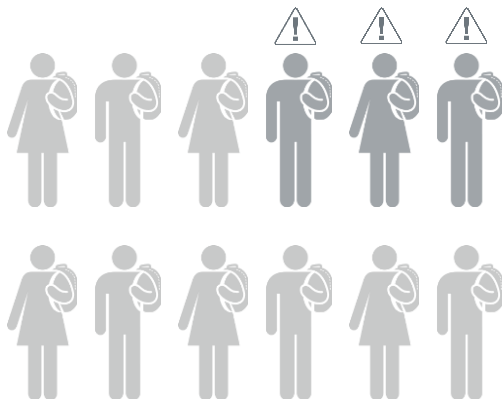
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Creating Capacity with Proactive Campaign Calendaring

Expanding How You Think About Campaigns



What Is a Campaign? Focusing outreach and advising efforts on a subpopulation with a shared academic risk 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



Adding Capacity with a Major Declaration Campaign

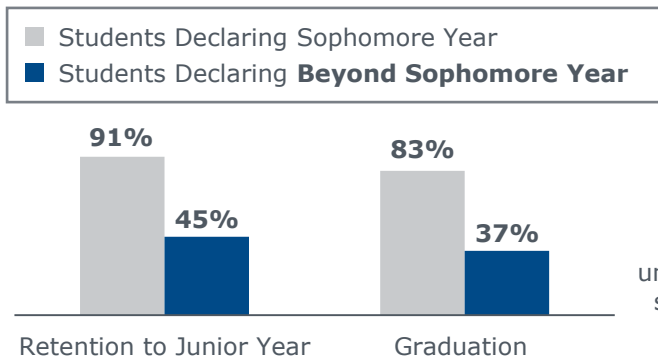


Plymouth State University

- Plymouth, NH
- 4,065 Undergraduates
- Public Masters University
- 72% Retention Rate
- 56% Six-Year Graduation Rate
- Joined SSC in July 2014



A Major Declaration "Gap" at PSU



15%

Of native PSU students are undeclared beyond sophomore year

Majority of Undeclared Freshman Handled by Small Staff

178

Incoming students in need of registration and major exploration support (fall 2014)



3

Staff in the **Center for Student Success** (all other advising handled by faculty)



Dean



Full-time
Advisor



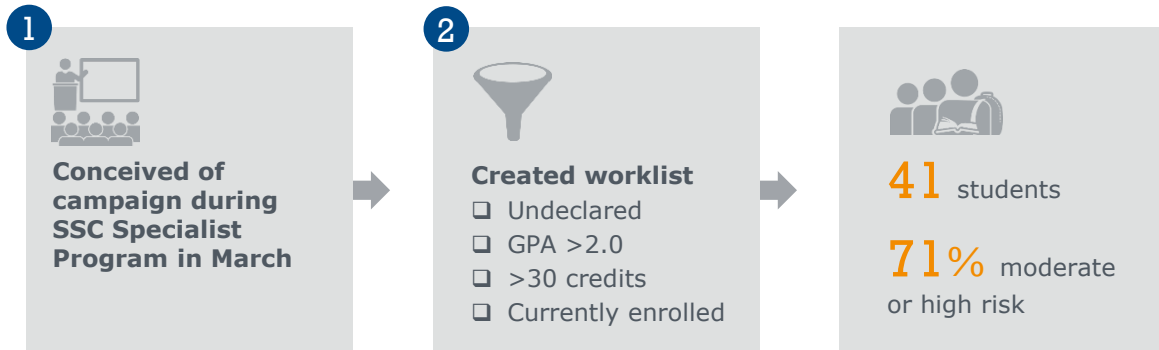
Advisor
(New Position)

One Advisor's Major Declaration Campaign

Proactively Approaching Students to Guide Smart, Early Major Choices

Campaign Objectives

- Provide **individualized attention** to discuss options
- Provide major-specific course guidance, **removing barriers** to registration if needed
- Persuade >50% of targeted students to **declare major** before the end of the spring semester
- Transition students to a faculty advisor within their major to **free up advisor capacity** for future undeclared students
- Increase **engagement** as well as **retention and graduation rates** for targeted students



Immediate Impact

Positive Results for Targeted Students, Reduced Workload for Next Term

Campaign Results

61%

Of students declared a major before registration (goal was 50%)

8

Students identified as needing intensive declaration support

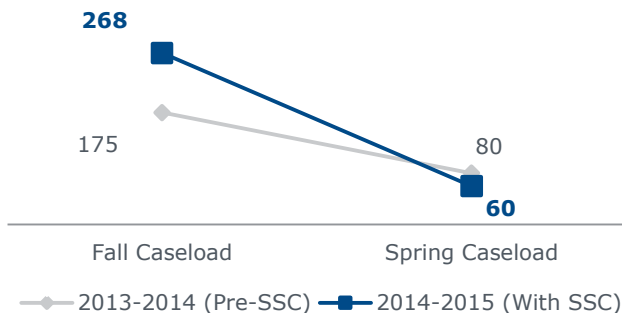
24%

Increase in fall to spring advisor capacity compared to prior year



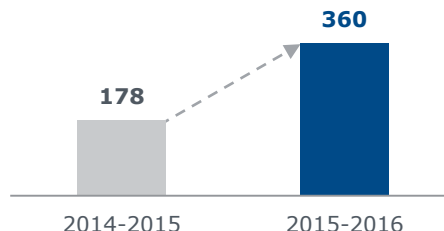
Freeing Up Advisor Capacity...

Decrease in Fall-Spring Caseload



...Not a Moment Too Soon

Increase in Incoming Undeclared Freshman



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

- Pull forward conversations or tasks that would otherwise need to happen during peak time
- Improve students' standing so that they won't be at risk during a time when you aren't able to provide as much support
- Help students declare a major or move to upper division

- Faculty progress report campaign used to identify, pull forward conversations with struggling students prior to mid-terms
- Appointment campaign for higher performing students, to answer their questions and complete tasks early so they do not need to come in during registration

[illegible]

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
				1	2	3
4	5	6	7	8	9	10
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Putting Together Your Campaign Calendar

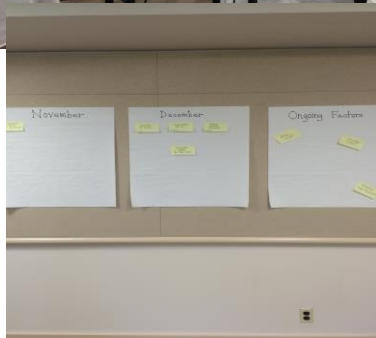
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31						

Departments Coming Together to Build Campus-Wide Campaign Calendars



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- Please take a minute to provide your thoughts on the presentation.

THANK YOU!

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