# EAB

# How to **Proactively Manage** Your Student Caseload

Best Practices and Tips from 550+ Navigate Schools

**About EAB Navigate**

Navigate is a Student Success Management System that helps advisors manage their world and guide more students to success. Based on a decade of research, Navigate is designed to overcome advisors' biggest challenges. Navigate provides communication, scheduling, and case management tools; analytics to tailor outreach and track impact; and access to a library of resources. More than 200,000 advisors at 550 colleges and universities currently use Navigate.
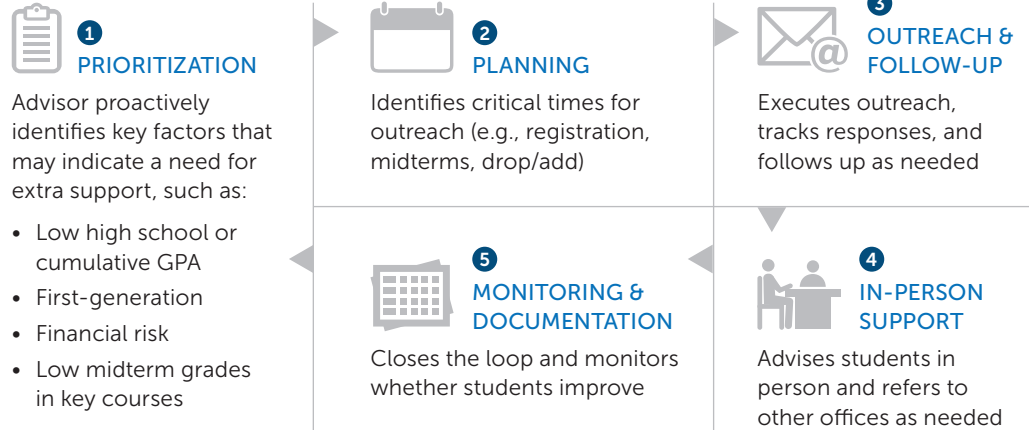
# What Is Proactive Caseload Management?

▶ Defining an Emerging Approach to Advising

## Three "Prerequisites"

**1 Assigned Student Caseload**
Advising structure allows for reasonably sized assigned caseloads of <350 students

**2 Proactive Advising Approach**
Advisor supports students holistically with an emphasis on long-term goals, solving problems before they escalate

**3 Access to Central Technology**
Advisors and support staff across departments use a shared system to view data and collaborate

## Five-Step Framework

**1 PRIORITIZATION**
Advisor proactively identifies key factors that may indicate a need for extra support, such as:
- Low high school or cumulative GPA
- First-generation
- Financial risk
- Low midterm grades in key courses

**2 PLANNING**
Identifies critical times for outreach (e.g., registration, midterms, drop/add)

**3 OUTREACH & FOLLOW-UP**
Executes outreach, tracks responses, and follows up as needed

**4 IN-PERSON SUPPORT**
Advises students in person and refers to other offices as needed

**5 MONITORING & DOCUMENTATION**
Closes the loop and monitors whether students improve

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▶ **PRIORITIZATION**
**Directing Attention to the Students Who Need It Most**

### Sample Communication Schedule

| WEEK | High Level of Support Needed — 5% of cohort | Moderate Level of Support Needed — 25% of cohort | Low Level of Support Needed — 70% of cohort |
|---|---|---|---|
| 2 | Check-in/initial coaching session | Check-in/initial coaching session | Check-in/initial coaching session |
| 3 | Complete success plan with student | | |
| 4 | Assess/adjust plan | Create semester plan | |
| 5 | Assign resources or tutoring | | |
| 6 | Check-in prior to midterms | Check-in before midterms/adjust plan | Check-in before midterms |
| 7 | Reflect on first half of term | | |
| 9 | Plan from midterms | Check-in about registration | |
| 10 | Reality check/adjust plan | | |
| 11 | Check-in about registration | | |
| 12 | Register for classes | | |
| 13 | Follow-up after registration | Follow-up after registration | Follow-up after registration |
| 14 | Reflect/set goals for next term | | |
| **TOTAL CONTACTS** | **12** | **5** | **3** |

▶ OUTREACH AND FOLLOW-UP
## Techniques to Improve Response Rates

### Optimize Subject Lines

- Email subject lines should contain **fewer than 30 characters**

- Subject lines that include a question mark or begin with "How to…" tend to have **higher open rates**

- For emails requiring an action, subject lines should be **urgent and action-oriented**, possibly including a **next step** in the subject line

### Audit Email Content

- Use a **tone** that is student-centered and student-friendly

- Ensure **readability** by translating higher ed jargon, removing passive voice, and reducing multisyllabic words

- Keep messages **short** (<100 words) and emphasize a clear **call to action**

### Use Alternative Channels

- Direct students to the **Navigate app** for checklists and ongoing guidance

- Use **texts** sparingly for time-sensitive messages

- If email and text don't work, some students are responsive to **phone calls** or **Facebook** messages

- If all else fails, consider an in-person **classroom visit**

**Already an EAB Navigate user?**
Access more resources and tips in the Navigate Help Center.

▶ MONITORING
## Choosing the Right Success Metrics for Your Caseload

### Tips

☑ Select **2–3 metrics** that make sense for your specific caseload

☑ Track weekly in a central location, using Navigate to help pull relevant data points

☑ Review on an ongoing basis to prioritize within your caseload and intervene when appropriate

☑ During your first year of tracking, identify targets you hope to achieve then adjust goals as needed in future terms

### Sample Metrics

| Advisor-Student Contacts | Goal | Outcome |
|---|---|---|
| ☐ Response rate to outreach | | |
| ☐ Number of advising appointments scheduled/attended | | |
| ☐ Number of interventions based on early alerts | | |
| ☐ Number of cases closed | | |
| **Student Actions or Status** | | |
| ☐ Percentage of caseload that submitted a degree plan | | |
| ☐ Percentage of caseload that declared a major on time | | |
| ☐ Percentage of caseload in good standing/SAP eligible | | |
| **Student Progress and Outcomes** | | |
| ☐ Number of milestones met/anticipated graduation date | | |
| ☐ Percentage of caseload that improved or maintained their GPA | | |
| ☐ Percentage of credits earned (vs. credits attempted) | | |
| ☐ Percentage of caseload that registered for the next term | | |
| ☐ Percentage of caseload that persisted to the next term | | |

# How EAB Navigate Helps You Manage Your Caseload
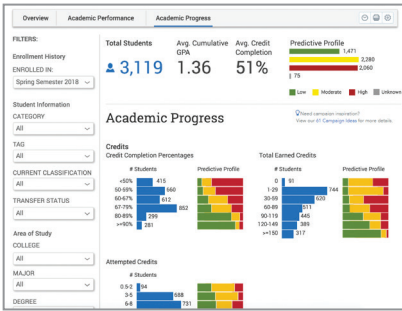


## 1 Prioritize Attention Across Your Assigned Students

**Dashboards and Search Tools** Highlight Student Performance Across Your Caseload or College*

- Visualize performance indicators including predicted risk, GPA distribution, credit completion, DFW grades, and current registration status

- You can also use Advanced Search to identify and track groups of students based on a wide range of criteria

- You can save, export, or send outreach and appointment requests from your Advanced Search results
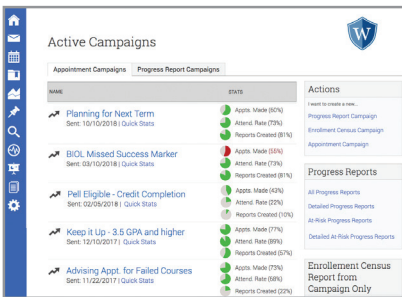


## 2 Easily Manage Your Outreach and Ongoing Campaigns

**Campaign Management** Allows You to Manage the Progress and Performance of Active Outreach Campaigns

OTHER FEATURES

- Appointment scheduling
- Automated appointment reminders
- Multimodal communication
- Free-form notes and appointment summaries
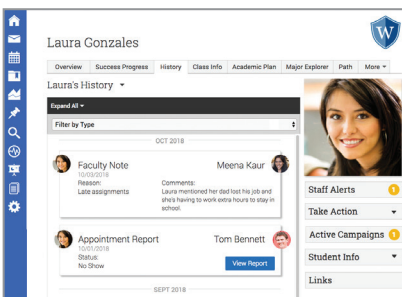


## 3 Access a History of Each Student's Interactions

Advisors Can See a **History Feed** of All Recent Appointments, Referrals, and Notes from Staff and Faculty Across Campus

- The Student Smart Profile gets you up to speed on a student's performance so you can tailor outreach and advice in the moment

- On the History tab of the Student Profile, view all previous interactions to ensure that support is coordinated and not redundant

- Easily see whether a student has followed through on your advice by attending tutoring or other services

*Dashboards are available to members with applicable capabilities. Users must have the appropriate permissions to access them.



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