



Navigate Promotion Webinar

April 14, 2020

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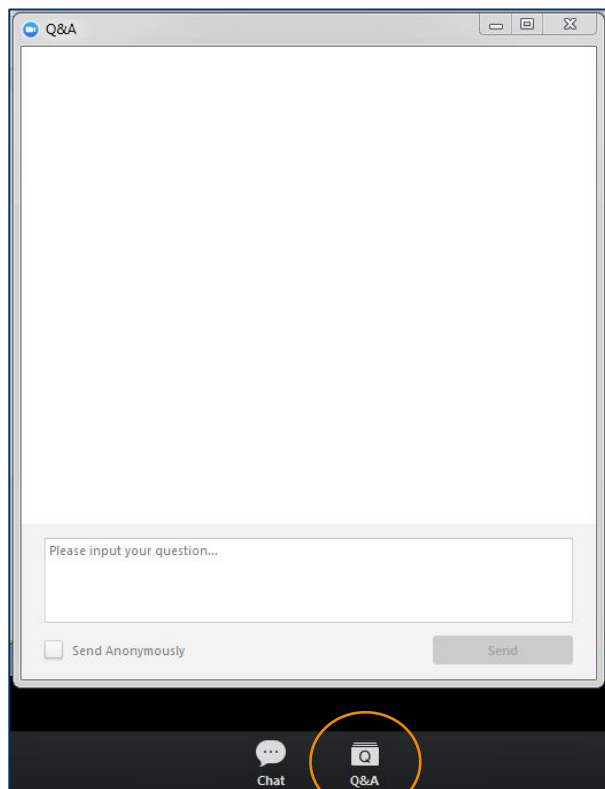
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Asking a Question

To ask the presenter a question, navigate to the Q&A button at the bottom of your screen and type it into the Q&A Panel.

After the webinar, a member of our team will be in touch to follow-up on your questions individually.

Type your question here



Today's Presenters



Rachel LaVigna

Strategic Leader

RLaVigna@eab.com



Bridget Hubbard

Strategic Leader

BHubbard@eab.com

The Importance of Virtual Promotion

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What Are The Three Main Goals?

1.



To Highlight Features and Functions of Navigate

Articulate the benefit of Navigate by explaining each feature's value to staff and students, respectively

2.



To Target Select Staff as Navigate Promoters

Address the WIIFM ("What's In It For Me?") for staff to ensure they are poised to promote Navigate

3.



To Drive Adoption And Utilization

Clearly state to students how to download and use Navigate; clearly explain to staff how to access, test, and use Navigate

Three Key Ways To Drive Adoption and Utilization

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STAFF EDUCATION

1 Empower Your Staff To Promote Navigate

- Educate staff on Navigate benefits and integration points
- Schedule advisor training sessions
- Send Navigate welcome letter to staff and first-year instructors

Key Partners:

*Administration, Advising,
First Year Experience Teams*



ACTIVE PROMOTION

2 Facilitate Active Instruction For New Students

- Arm orientation first year seminar leaders to be Navigate's champions; work with pilot advisors and superusers to be Navigate champions
- Encourage Navigate downloads at orientation and in first-year success courses

Key Partners:

*Enrollment, Student Affairs,
Orientation Leaders,
Student Representatives*



DIGITAL PROMOTION

3 Send Continual Reminders To Non-Adopters

- Create webpages, resource banks, newsletters, and relevant videos and graphics for Navigate promotion
- Activate email campaign

Key Partners:

*Marketing and
Communications, Social
Media Team*

NAVIGATE: Communicating with Students

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Focus on Improvement in Student Experience, Access to Resources



What Do They Care About?

- Reducing the stress and confusion around college requirements and progression



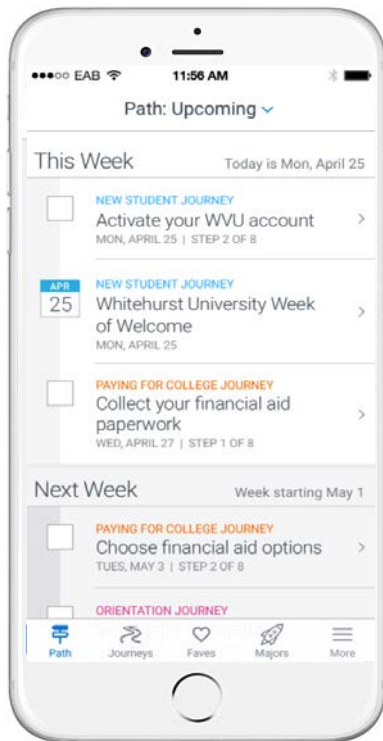
What Will They Attach to Most?

- Person-to-person dialogue (advising interaction, faculty introducing, first year success course)



What Do You Need From Them?

- Adoption of platform
- Regular utilization of data-generating features (i.e., Major Explorer, Quick Polls, Appointment scheduling)

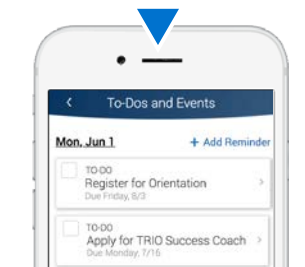


Why Navigate is Important for Students Right Now

Urgency Levers to Guide Your Promotion

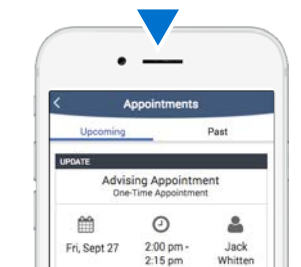
Challenge: New students may miss key info usually delivered in-person, increasing risk of summer melt

Solution: The Pivotal Moments Path organizes and prioritizes onboarding and ongoing guidance to help students transition to college life



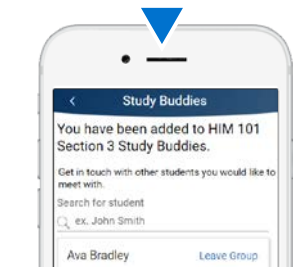
Challenge: Students need to meet with advisors and other staff virtually for registration and support

Solution: Students can easily request appointments, noting how they would like to be reminded, and reschedule if missed



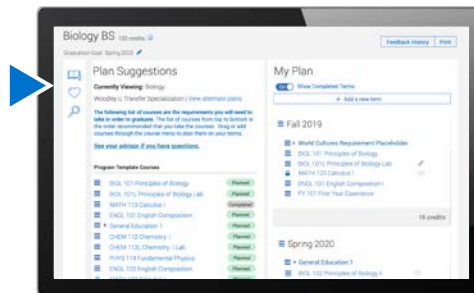
Challenge: Students miss out on the academic support and camaraderie of being with peers

Solution: The Study Buddies feature allows students to connect with each other virtually when they can't be on campus



Challenge: Without in-person advising, students lack guidance on creating a functional, long-term academic plan

Solution: Navigate's Academic Planner allows students to see degree maps, program requirements, sequence rules, and recommendations as they drag and drop courses to build their plan; automated guardrails prevent errors and inefficiencies

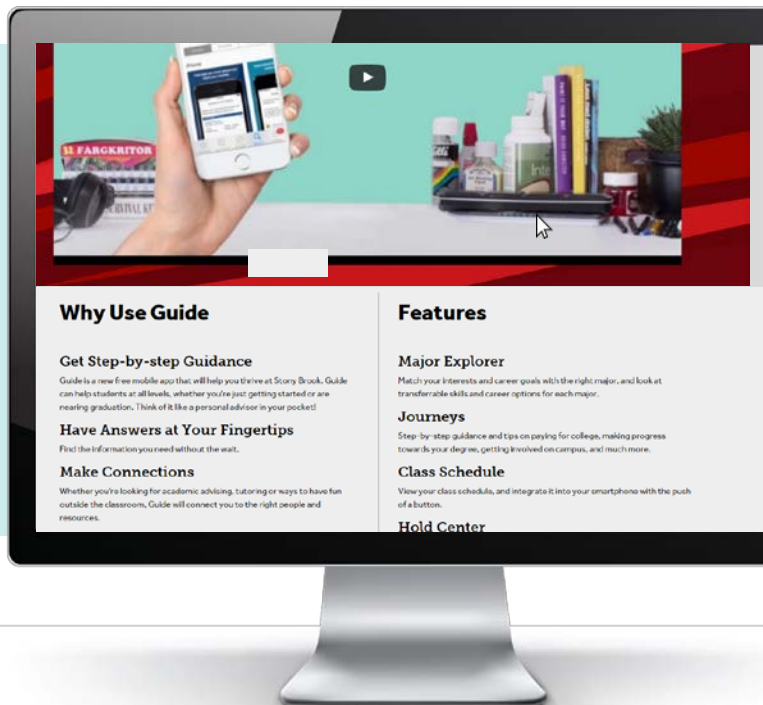


Basic Digital Promotion

Navigate page on your school's website

Build a Navigate Microsite or Landing Page

- Include the 'what's in it for me' for the student explaining why they should use Navigate
- Introduce key Navigate features
- Provide QR code for easily downloading the app
- Add any fun introductory or how-to videos



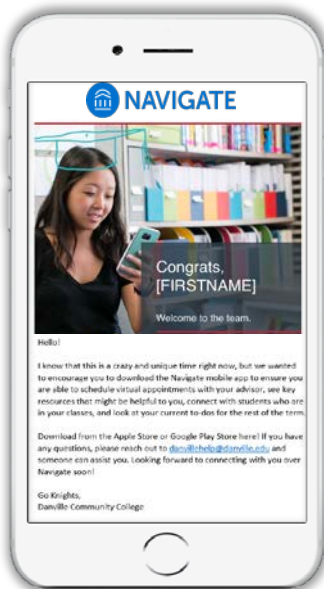
Basic Digital Promotion

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Onboarding and Engagement Emails Sent To Students Promoting Navigate

1

Onboarding Emails to New Students



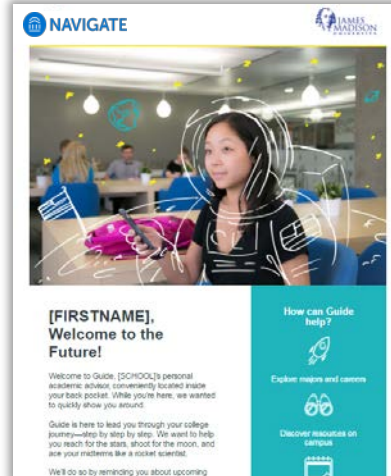
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New Feature Announcements to Active Users



3

Re-Engagement Emails to Inactive Users



Elevating Your Digital Presence

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Leveraging Social Media

Posting On Social Media

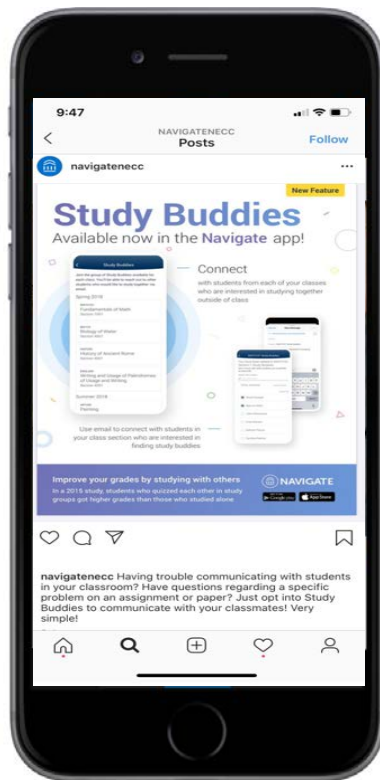
Shareable social images, Instagram carousels, and captions

Leverage Campus Celebrities to Reach Broader Audiences

College mascot's Instagram, President's Twitter, College snapchat, Student Body President's Facebook

Tweeting About Navigate

"#Accepted? Congrats! Download the Navigate app by searching "Navigate Student" in app stores to get started. [Promotional video + link to microsite]"

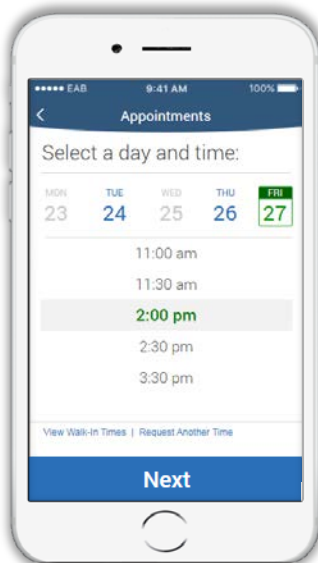


Elevating Your Digital Presence

Easy Wins

1

Instruct advisors to discuss Navigate in virtual student meetings



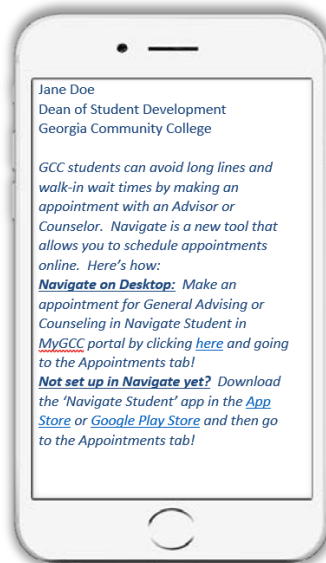
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Highlight Navigate in blogs, newsletters, and resource roundups sent to students



3

Link to Navigate in staff and leadership email signatures



Reaching Key Student Groups



Student Population	Promotion Action
Students who have not logged in or downloaded the app	Text with information on how and why to download the mobile app
Students who have not attended an advising appointment this term/year	Email to all: "Did you know you can meet with an advisor virtually? Download Navigate to make an appointment" Appointment Campaign to students flagged at-risk, special populations, etc. + Text nudge to non responders
Students enrolled in first-year success course	Instruct students to download app in first class + explain why it's important Assignment to use Navigate (complete Major Explorer, Schedule Appointment, Check out Virtual Resources, AP)
Students enrolled in milestone courses	Provide your faculty or department chairs/academic deans with scripting to promote Study Buddies during class, on syllabi, and/or in an email to the class
Students who did not attend orientation or similar events where Navigate is heavily featured	Email introducing Navigate and how it can help students in this virtual world Include a link to the Apple or Google Play store that takes students to download the app

Why Navigate is Important for Staff and Faculty Right Now



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Urgency Levers to Guide Your Promotion

Challenge: With students spread out around the world, it can be hard to contact them

Solution: Contact students through email, text, or phone, providing virtual support and scheduling appointments

SEND A MESSAGE TO LAURA GONZALES

Send Email Send Text

To: Laura Gonzales

Subject:

How's everything going?

Message:

Laura - I'm worried about your recent performance in a few of your courses and the recent tutoring sessions you've missed. Is something going on?

Send Additional Email Notifications To:

Cancel Send Message

Challenge: Students may not have the technology needed to fully participate in virtual courses

Solution: Faculty send alerts about students in need of support, and advisors and other staff create cases to track referrals

MANAGE CASE

Laura Gonzales

Reason(s): Financial Aid

Case Owner: Jack Whitten Assigned to: Financial Aid Office

Case Activity

01/07/2018

- Jack Whitten opened case
- Jack Whitten added comment:
Laura's family is having some financial difficulty. I would like her to speak with a counselor to discuss options for help in paying for her college.
- Jack Whitten assigned case to Financial Aid Office

01/15/2018

- Financial Aid added comment:
Emergency funding issued
- Financial Aid Office closed case

Cancel Close Case

Challenge: Managing a caseload of students is even harder when you can't speak to them in person

Solution: Staff can send and monitor progress of campaigns, tracking which students have responded/scheduled appointments

Active Campaigns

Appointment Campaigns Progress Report Campaigns

NAME	STATE
Planning for Next Term Sent: 10/10/2018 Quick Stats	Acpts. Made (50%) Attend. Rate (73%) Reports Created (61%)
BIOL Missed Success Marker Sent: 03/10/2018 Quick Stats	Acpts. Made (66%) Attend. Rate (73%) Reports Created (61%)
Pell Eligible - Credit Completion Sent: 02/05/2018 Quick Stats	Acpts. Made (40%) Attend. Rate (22%) Reports Created (10%)
Keep it Up - 3.5 GPA and higher Sent: 12/10/2017 Quick Stats	Acpts. Made (77%) Attend. Rate (69%) Reports Created (67%)
Advising Appt. for Failed Courses Sent: 11/22/2017 Quick Stats	Acpts. Made (73%) Attend. Rate (68%) Reports Created (22%)

Communicating with Staff and Faculty

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Focus on Streamlined Workflow; Ability to Help More Students Succeed



What Do They Care About?

- Supporting and empowering students
- Building and sustaining relationships with their students virtually
- Tracking what made a difference



What Will They Attach to Most?

- Ease of communication with students
- Using Navigate to minimize rote tasks and streamline their calendar/workflow
- Ability to close the loop with other offices and track their impact



What Do You Need From Them?

- High level of engagement with the platform
- Flexibility in adapting current practices
- Willingness to become more strategic

Keshia Aaby

Overview Success Progress Reports/Notes Class Info Major Explorer Calendar Appointments Conversations

Success Markers

The student has missed guidelines for progress. Acting on them can help get the student back on track for successful completion.

Completed Missing Upcoming

4 missed markers

Notification	Outcome
1 BIOL2107K Recommended grade: B- (1 course) Complete between 15 and 30 credits	Needs attention 1 Attempt
1 BIOL2108K and CHEM1212K Recommended grade: C+ (2 courses) Complete between 30 and 45 credits	Needs attention 2 Attempts
1 CHEM1211K Recommended grade: B- (1 course) Complete between 0 and 15 credits	Needs attention 1 Attempt
1 MATH1070, MATH113 or higher Recommended grade: B- (1 course) Complete between 15 and 30 credits	Needs attention 2 Attempts

EAB Campus

Keshia Aaby

Overview Success Progress Reports/Notes Class Info Major Explorer Calendar Appointments Conversations

Sign-in Rate	Retention Rate	On-Time Rate	Student Success Rate	Completion Rate
0	0	0	4	2.79

Academic Success for Spring 2019
credits, 0 classes

First Course Retention
33.00%

First Course Success
9.38%

Biological Science

Medium Risk

Student ID: 812345678

Location: Springfield

Year started in school: Spring Semester 2015

Staff Alerts

- Manage Student
- Add a Note on the Student
- Add a Teacher to the Student
- Report On-boarding
- Schedule an Appointment
- Issue an Alert
- Edit Case Settings
- Respond via Chat

Student Info

Examples of Virtual Staff Promotion

Email to all employees **recognizing the great work that instructors and advisors have done to support the students**, highlights that what they're doing is working, provides transparency on how they're moving the dial on student success




From: Michael Campbell
Sent: Wednesday, January 22, 2020 2:58 PM
To: cc_all <cc_all@cerrocoso.edu>
Subject: Progress report from the Office of Instruction

UMassAmherst
Student Success

NAVIGATE

A TOOL TO CONNECT OUR UNIVERSITY AND
ENHANCE STUDENT SUCCESS.

Why Navigate?

 Best-Fit Student Appt Scheduling Create efficiency in appointment scheduling with 2-way calendar integration and student-facing scheduling. Engage students in the scheduling process based on your availability and services.	 Document Interactions & Track Visits Summarize your interactions and/or track visits at programs and events. Mark students as no-shows.	 360 Student Profile Access student information in a single place. From the student profile you can: View academic record View all other interactions and notes Message the student Report on an interaction Make a referral
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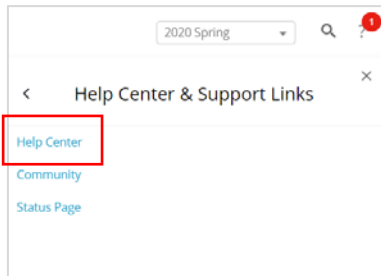
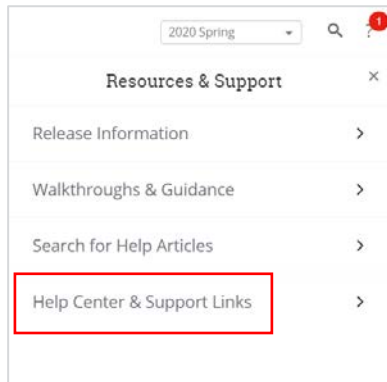
Steps 1 - 2 - 3 for Access
(1) Complete the Online FERPA Certification
(2) Apply for Access: Spire > Main Menu > My Spire > Spire Access Request - Student Success Collaborative Navigate
(3) Participate in Training

Navigate Support, navigate@umass.edu, umass.edu/studentuccess, (413)577-6767

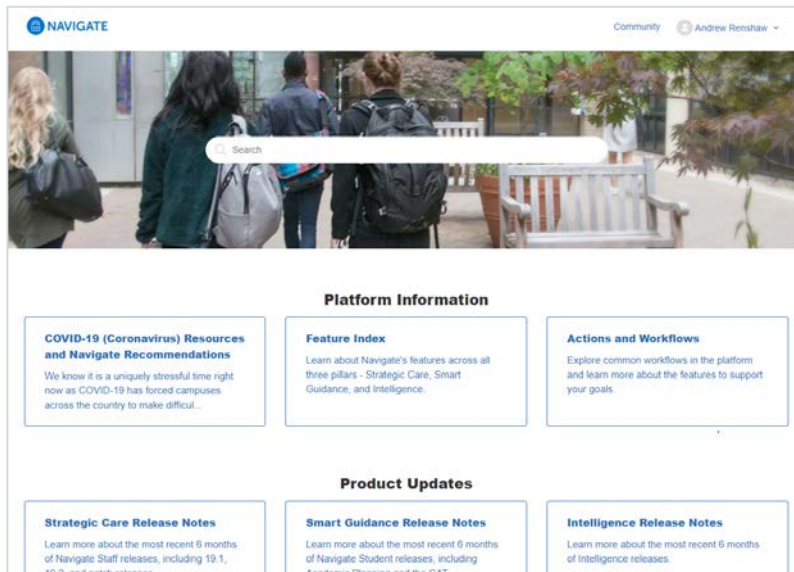
One pager sent to staff that provides a **quick overview of the most useful features in Navigate**, how to use them, and where to go with questions

Navigate's Help Center

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Login to Navigate → Select the ? in the top righthand corner → Help Center and Support Links → Help Center





Open Discussion



Let's Hear From You...



1

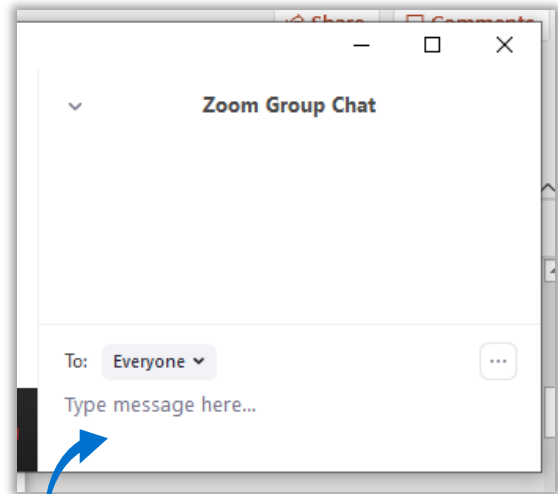
What **creative strategies** have you used so far to promote Navigate?
What's worked?

2

What **promotion tactics** are you planning to try?

3

Since going virtual, what **unexpected promotion challenges** have surprised you the most?



To participate, share your thoughts in the chat.

Let us know if you'd like to be unmuted so you can share aloud!

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