

How Georgia Tech Rebuilt Trust in Advising by Swapping Their CRM for Navigate360

BACKGROUND

The Georgia Institute of Technology, a public R1 university in Atlanta with over 20K undergraduate students, is pursuing a 2020–2030 strategic plan focused on stronger outcomes, value, and student experience.



Impact Highlights

In first semester with Navigate360

11K+

unique students served through Navigate360

24K+

appointments created by 7 different colleges

10%

higher re-enrollment rate for students who attended a Navigate360-initiated advising appointment compared to those who did not

OPPORTUNITY

Georgia Tech's previous CRM created more barriers than benefits.

When Georgia Tech implemented a CRM built for cross-industry commercial use, they had neither the advisor buy-in nor the vendor support and training materials needed for a successful rollout. It never aligned with the realities of advising workflows, especially for a highly decentralized institution. Internal IT teams carried the heavy burden of building and configuring the platform to meet advisor needs. At the same time, Georgia Tech saw gaps in student outcomes but had no clear way to identify which students needed help or coordinate support across units. The CRM was the immediate problem, but negative impact extended across the student experience. Georgia Tech needed a better way to create shared visibility, coordinate care, and intervene earlier while preserving the strengths of decentralized advising.

SOLUTION

Navigate360 allows Georgia Tech to build and power advising workflows.

Student success leadership first worked with campus stakeholders to define a shared advising philosophy, then partnered with Navigate360 to put that vision into practice. EAB's strategic guidance, combined with a provost-level mandate and thoughtful roll-out process, helped Georgia Tech launch Navigate360 in a way that fit its decentralized advising model and earned buy-in across campus.

IMPACT

For the first time, advisors across Georgia Tech's decentralized campus are working toward the same vision of student care.

Since launching Navigate360 in July 2025, Georgia Tech saw strong early adoption across its decentralized campus, already supporting 24,000+ appointments through the platform. They now have greater visibility into student support activity, a stronger foundation for proactive outreach, and an advising community that is excited about the work again. Early enrollment campaign results are also promising, suggesting the new model is helping Georgia Tech better connect students to the support they need.

“Advisor morale had been really low. They didn't have the tools that they needed, but now they're excited about their job. They feel like their profession has been honored in this way by supporting them with this technology—just to see how happy they are with their work, and of course that transcends to our students.”

Dr. Loretta Swank, Executive Director, Academic Success and Advising

Why Georgia Tech Switched to Navigate360

A Trusted CRM Built for Advising, Coordination, and Early Intervention

“ I had more capabilities with Google spreadsheets and Calendly than advisors had with the prior CRM. **EAB’s honest approach on what they offer and deliver is critical.** (CRM) sold us a concept that didn’t deliver.”

Dr. Loretta Swank, Executive Director, Academic Success and Advising

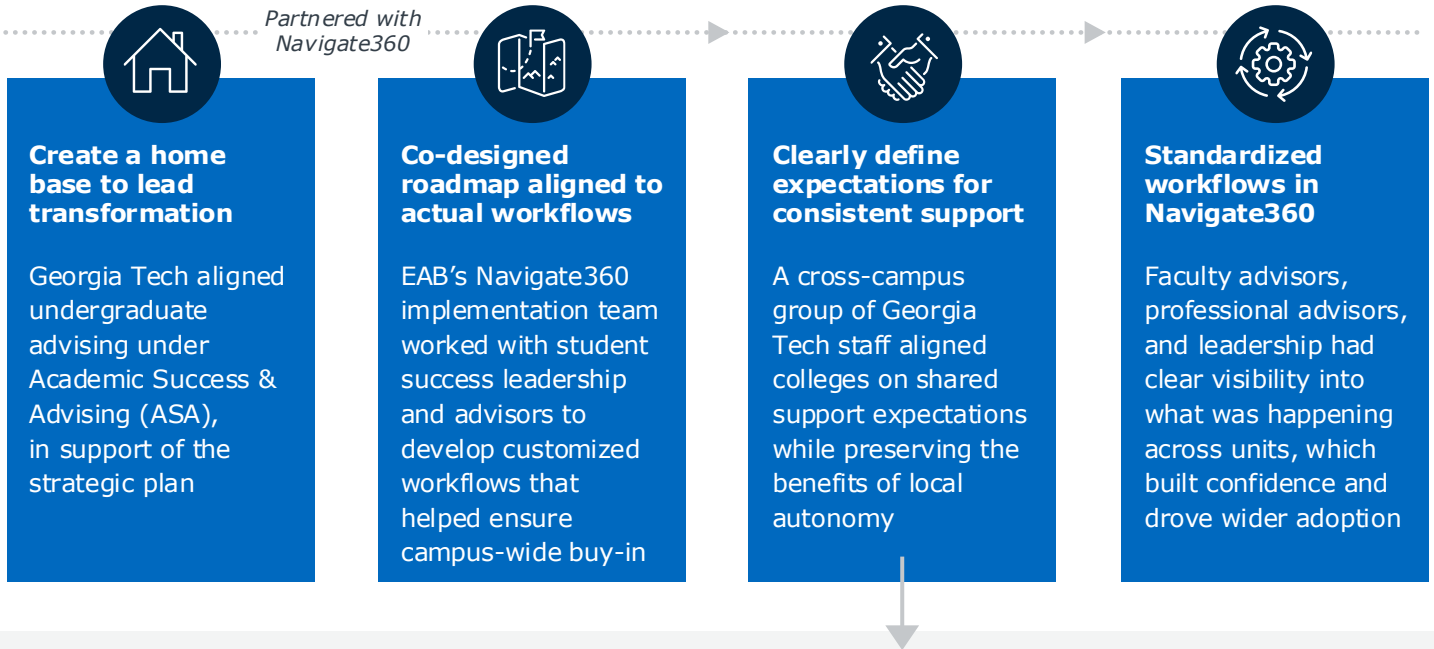
Where Previous CRM Fell Short	What Navigate360 Delivered
 Built for sales/marketing workflows, not student support, with terminology and navigation that felt unintuitive for advising	 Advising-first workflows designed for student support teams
 Core advising needs required significant build, testing, and configuration, taking capacity from IT and advisor time away from students	 Intuitive ready-to-use student success capabilities without extensive custom build
 Limited training resources; even strong users reported only surface knowledge	 Dedicated support team and training through the life of the partnership to improve launch, adoption, and on-going usage
 Drop-in support was hard to run: no kiosk/virtual queue; units weren’t managing drop-ins in the system	 User-friendly tools to help students connect with staff, such as visible availability, drop-in hours, and self-scheduling.
 Notes and documentation were hard to find/share; cluttered views and narrow reports limited usability	 A more consistent advising record through appointment summaries and shared documentation
 Limited proactive outreach: no campaign features for advising use cases	 Clear, shared visibility into real-time student data and ability to deliver large-scale proactive outreach
 Per-user licensing, paid add-ons (e.g., calendar sync), and consulting/training services increased costs and limited scalability	 Licensing includes unlimited staff users to support broad campus adoption, with transparent pricing and included EAB support

Georgia Tech's Student Success Reset

Thoughtful Implementation Rebuilt the Trust Needed to Drive Transformation

Four-Step Framework Proven to Secure Buy-In

When partnering with a tech vendor, the approach to implementation is almost as important as the product itself. During implementation, the Navigate360 team worked with Georgia Tech leadership and advisors to collaboratively design right-fit workflows rather than configuring the system from the top down. In approaching roll-out, leadership tailored their messaging to their audience. Promotions to professional advisors focused on how Navigate360 would improve the student experience; for faculty advisors, communication highlighted its ability to reduce scheduling friction, replace paper notes, and make their own workload easier to manage. Every advisor attended an in-person session, synced calendars on the spot, practiced summary reports, and reviewed note guidelines.



More Than a Software Swap

Georgia Tech designed a new support model that better aligned to the realities of decentralized advising and chose Navigate360 because it supports both sides of their "unique but united" vision.

UNIQUE Flexible to reflect academic culture, discipline-specific needs, and capacity

- ✓ How advising is delivered (drop-ins vs. required)
- ✓ Which milestones and touchpoints a college chooses
- ✓ Discipline-specific guidance and resources
- ✓ Which proactive practices are feasible locally

UNITED Standardized to provide consistency, shared access, and coordination

- ✓ Shared system of record for support activities
- ✓ Appointment availability and drop-in hours visible
- ✓ Document student interactions in shared system
- ✓ FERPA-aligned summary reports

Student Profile

Overview | Success Progress | History | Pre-enrollment | Courses | Journeys | Program Advising

Course Grade D/F	Repeated Courses	Withdrawn Courses	Missed Success Markers	
2	1	0	3	
Cumulative GPA	Total Credits Earned	Completion Ratio	Support Level	
2.85	27.00	90%	High	

All advising practices happen in Navigate360 for consistent visibility

- Student profiles and shared history
- Availability and appointment scheduling
- Appointment summaries and case notes
- Report templates and required fields

Snapshot of the First Semester with Navigate360

Six Months of Progress After Swapping to a CRM That Fit Their Workflows



“Not a week goes by that an area of campus doesn’t ask, ‘**How do we get on board with Navigate360?**’”

*Executive Director,
Academic Success and Advising*



Culture shift toward student-centered support

New users are aligned on scheduling and documentation from the start



Campus coordination is simpler

Teams can see what’s happening across units for the first time



Earlier outreach is possible

Clearer line of sight into who needs follow-up and when



24K+

appointments created by **seven different colleges**



11K+

unique **students served** through Navigate360



319

faculty and staff using Navigate360



49%

of faculty and staff **are super users** (10+ logins per month)

Early Persistence Signals of Success in Georgia Tech’s Optional Advising Model

Navigate360 made it easier for students to connect with advising support across colleges. On a campus where appointments are optional for students, early results suggest that those who engaged are more likely to re-enroll.

10%

higher re-enrollment rate for students who attended a Navigate360-initiated advising appointment (98%) compared to those who did not (88%)

Spring 2026 enrollment campaign