EAB | Student Success Collaborative™

Toolkit: Designing and Implementing a Targeted Advising Campaign

SSC—Campus Targeted Advising Campaigns

Targeted advising campaigns enable advisors to operationalize a proactive approach to advising students by directing outreach to specific populations of students in need of supplemental attention. By putting a special focus on the students who they can help the most or with actionable next steps, advisors are able to maximize the overall impacts of their efforts.

The SSC—Campus platform makes it easier to run these initiatives with a suite of tools for quickly identifying, contacting, and meeting with students. By deploying SSC—Campus risk analytics in combination with workflow tools, advisors can create highly-specific campaigns and ensure that no students fall through the cracks.

This toolkit provides step-by-step instructions and tools for designing your own targeted advising campaign using the SSC—Campus platform. Please reach out to your Dedicated Consultant with any questions.

Good luck!

Advisors use SSC—Campus campaigns to...

Make a greater impact on student success through improved processes for identifying and reaching students, especially those at high risk

Focus limited advisor time on manageable groups of students

Efficiently channel targeted outreach, resources, and attention toward groups of students with similar needs

Explore and popularize innovative ideas for data-driven advising practices

Toolkit Contents

The best practices are the ones that work for **you**.℠

Guide: Targeted Advising Campaign Design Process

Step 1: Define a Target Student Population

1. Brainstorm a group of students that you want to target for intervention (use the worksheet on p.4 to write out each step in your design)

2. Select the parameters that will define this population and create a campaign list in the SSC—Campus platform (For step-by-step instructions on creating an appointment campaign see p. 9)

3. Articulate objectives for the short-term (e.g., rounds of outreach, advising sessions) and long-term (e.g., retention, tutoring appointments) impacts of your campaign

Step 2: Plan Your Outreach Strategy

4. Determine how frequently and in what way you will contact targeted students (track the success of different types of outreach to inform future campaigns and other advisors)

5. Articulate the messages you want to communicate and resources you want to provide at each interaction (e.g., outreach, advising sessions); consider the action steps this specific student population needs to take and craft appropriate messages

6. Identify next steps you will take to follow up with these students and ensure the impact of your initiative

7. Use the appointment campaign functionality in the SSC-Campus platform to launch each round of email outreach.

Step 3: Evaluate and Communicate Your Campaign Success

8. Identify metrics for measuring the outcomes of your campaign and targets that will define success

9. Determine how you will communicate your targeted advising campaign's outcomes, including communication format and audiences (e.g., other advisors, deans, SSC—Campus consultant)

Questions to Ask in Selecting a Population
- Which students struggle but might not seek assistance?
- What group of students am I passionate about?
- Which students need to complete specific actions in the near future to improve their chances of success or avoid barriers to their progress?

**Parameters Available in the SSC—Campus Platform:** cGPA, advisor/group, reminder set, student 's, last name, student status, college/school, major, concentration, degree, credits earned, student classification, term enrollment, risk, success markers, # of notifications

⚠️ Check that your parameters generate a manageable number of students. We recommend **30** to **75** students.

Suggested Outreach Frequency: In successful previous campaigns, advisors outreached to students **3** to **5** times over a one or two month period of the semester

Example Timeline

Week	
1	Email #1
2	Email #2
3	Phone Call
	Advising Sessions
6	Follow Up Email
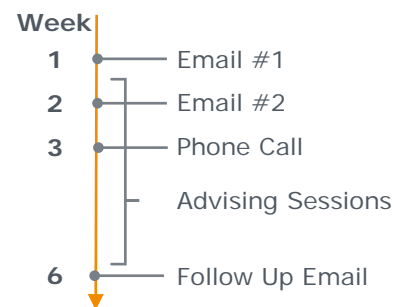
Potential Success Metrics

For Short-Term Outcomes
- Percent of intended students contacted for each outreach interaction
- Percent of original target population that completes an individual advising session
- Number of student status changes

For Long-Term Outcomes
- Changes in student notifications count
- Number of successful major changes
- Number of students whose risk prediction decreases by the next term
- Retention of the target population

Campaign Design Worksheet

Define a Target Student Population

My target student population and rationale for why they require this additional attention:

> *Mid-career Management majors with borderline GPAs but high risk predictions. They need help to succeed and have time to make significant changes but might fly under the radar.*

Parameters I will use to create an SSC—Campus campaign list:

- College/School: *Business*
- Major: *Management*
- Credits Earned: *30 - 60*
- Cumulative GPA: *2.00 - 2.70*
- Risk: *High Risk*
- Term Enrollment: *Currently Enrolled*

Objectives: This targeted advising campaign will…

1. *Contact all identified students at least three times to encourage them to initiate an advising session*

2. *Schedule an individual advising session with at least 75 percent of identified students*

3. *Connect 50 percent of students with the tutoring center to work on their academic standing*

4. *Reduce these students' risk of stopping out*

Total number of students identified: __45__

Plan Your Outreach Strategy

Action Steps These Students Need to Take:

- *Seek out academic support services, such as tutoring and study habit workshops*
- *Select and register for courses that match their strengths and in which they have a higher likelihood of success*

My Communication Plan:

Method	Timing/ Frequency	Communication Objective and Resources
☑ Email	*Two times, one week apart during the first half of the semester*	*First: notification of risk status, encourage to make appointment; second: more urgent encouragement, suggest tutoring center before midterms*
☑ Phone	*Once in the week after email #2*	*Discuss resources, why students are at-risk, try to schedule an in-person appointment*
☑ Advising Session	*Once as early in the semester as possible*	*Walk students through notifications, discuss why they are at-risk, maybe even discuss major choice, discuss study habits and time management, plan coursework for next semester*

My Follow Up Steps:

- *Check with tutoring center to see which students have made appointments*
- *Analyze student risk information one and two semesters after campaign*

Evaluate Your Campaign Success

Metrics and Target Outcomes:

Metric	Target	Actual Outcome
Percent of population contacted	*100%*	
Number of students that complete in-person advising sessions	*34*	
Number of students that make appointments with the tutoring center	*23*	
Number of students that improve their risk level by the end of the following semester	*25*	

Campaign Design Worksheet

Define a Target Student Population

My target student population and rationale for why they require this additional attention:

[ ]

Objectives: This targeted advising campaign will...

1.

2.

3.

Parameters I will use to create an SSC—Campus campaign list:

- ▪
- ▪
- ▪
- ▪
- ▪
- ▪
- ▪

Total number of students identified: _____

Plan Your Outreach Strategy

Action Steps These Students Need to Take:

[ ]

My Communication Plan:

Method	Timing/Frequency	Communication Objective and Resources
☐ Email		
☐ Phone		
☐ _____		
☐ Advising Session		

My Follow Up Steps:

[ ]

Evaluate Your Campaign Success

Metrics and Target Outcomes:

Metric	Target	Actual Outcome

Innovative Ideas for Targeted Advising Campaigns

Student Populations Targeted in Previous SSC—Campus Campaigns

Campaign	Example Filters	Action
☑ **At-risk students that may need to switch majors**	**Risk:** High risk **Credits Earned:** 30-45	Encourage students to evaluate their academic performance and consider a major change
☑ **Undeclared students above a certain credit threshold**	**Major:** Undeclared, Pre-major **Credits Earned:** At least 30, 45, or 60 credits (depending on the institution)	Help students select the appropriate major and declare as soon as possible
☑ **High-performing students not currently enrolled in coursework**	**Cumulative GPA:** Over 3.00 **Term Enrollment:** Currently not enrolled	Figure out why students are not enrolled and get them back into classes
☑ **Seniors with excessive credits**	**Student Classification:** Senior **Credits Earned:** At least 120	Help students determine what requirements they still need to fulfill to graduate and how to fulfill them quickly
☑ **Pre-majors that are at risk of not meeting selective admissions requirements**	Exact filters will vary by major **Possible Pre-Majors:** Pre-Nursing, Pre-Engineering, Pre-Business	Encourage students to prepare a "Plan B" and seek academic support to improve performance
☑ **Students close to graduating that may need additional assistance**	**Credits Earned:** At least 90 **Risk:** Medium risk or high risk	Connect students with the resources they need to finish out their degrees
☑ **Students who may not have been advised recently** (for institutions that use student statuses frequently)	**Student Status:** "No action taken"	Check in on students that the platform suggests may not have been advised recently
☑ **"Stop outs" that could return and graduate easily**	**Term Enrollment:** Currently not enrolled **Risk:** Low risk **Credits Earned:** At least 90	Motivate students to re-enroll and complete their degrees
☑ **Potential recruits for the honors program**	**Term Enrollment:** Currently enrolled **Risk:** Low risk **# of Notifications:** Less than 2 **Cumulative GPA:** Over 3.70	Discuss strong academic performance and potential enrollment in the honors program
☑ **High-performing students for recruitment to a particular major**	**Term Enrollment:** Currently enrolled **Risk:** Low risk **Major:** Undeclared	Ensure high-performing students know they are capable of taking on challenging majors

For more ideas, check out our 61 Campaign Ideas infographic. And if you run innovative targeted advising campaigns, send them to your SSC—Campus consultant to become part of our library!

Three Strategies to Extend Your Impact

Collaborate to Sustain Momentum

Run targeted advising campaigns concurrently with other advisors. Peer communication and accountability can help keep campaigns moving forward and elevate campaign quality – plus it gives you an excuse to collaborate!

Build Collective Knowledge

Don't keep your campaign insights to yourself. Debrief with colleagues after the completion of your targeted advising campaign to evaluate success, discuss lessons learned and best practices, and generate ideas for future campaigns.
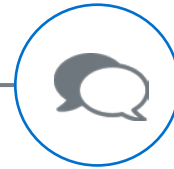
Share Your Success

Improve campus understanding and practices by communicating campaign results to the wider campus community. Consider a formal report or presentation to share your insights with advising staff, executives, deans, and faculty members.

Related Resource:
Measuring Campaign Effectiveness Toolkit

If you want to take your campaign design to the next level, ask your Dedicated Consultant for a copy of our complementary toolkit: Measuring Campaign Effectiveness. It containing a suite of tools to help you measure the impact of your campaigns and communicate your results, including:

- Guidelines for choosing campaign metrics
- Example campaign goals and outcomes
- Common results calculations
- Sample campaign report templates

Discovery Advising Campaigns to Generate Best Practices

Central Michigan University, Public Research University in Mount Pleasant, MI

CMU by the Numbers

27,626
Total enrollment

76%
First-year retention rate

54%
Six-year graduation rate

Case in Brief

Both **SSC—Campus initiative leaders** and **advisors** on CMU's campus recognized two challenges : integrating technologies into advising workflow and reaching the students most in need of help.

As a result, they conducted a targeted advising campaigns discovery initiative. By experimenting with campaign design and analyzing the results, CMU hoped to:
- Explore efficient, proactive ways of intervening with at-risk students
- Develop a concrete use-case and step-by-step methodology for the SSC—Campus platform to drive utilization
- Identify and communicate best practices for targeted outreach, to engage at-risk students in advising and success coaching services

Presentations highlighted critical insights gained through the campaigns initiative, especially around targeted outreach and recommendations for the implementation of future campaigns.

Empowering a Group of Engaged Advisors to Design and Test Campaigns

1 Started with a Small Group of Engaged and Innovative Advisors

CMU recruited seven success coaches from the Office of Student Success to run a "test" initiative of targeted advising campaigns

2 Provided a Template, but Let Advisors Select Their Populations and Outreach Strategies

Advisors focused on niche groups of students they were passionate about and designed their own unique outreach approaches and materials based on a common template

3 Ran Campaigns Simultaneously

Prevented advisors from "borrowing" each other's ideas, but met frequently with leadership to discuss progress and maintain momentum

4 Debriefed to Discuss Results and Synthesize Insights

Advisors each presented a portfolio of their results at an end-of-semester pull-up, leading to group discussion, analysis, and development of recommendations for future campaigns and use of the SSC—Campus platform

Central Michigan's Campaigns

Teacher Education Pre-Majors at Risk of Failing Admissions Requirements

Academic Support for Struggling Accounting Majors

Long-term Planning for Psychology (Graduate Preparation) Majors

Major Declaration for Undeclared Sophomores

Academic Support for Struggling History Majors

Potential Exercise Science Majors in Need of Major Re-evaluation

Communication Majors at Risk of Failing Program GPA Requirement

Business Administration Pre-Majors at Risk of Failing Admissions Requirements

Understanding the Needs of Recreation, Parks, and Leisure Services Majors

Portfolio presentations included:
- Campaign purpose
- Articulated objectives
- Target population
- Actions and interventions (planned and completed)
- Progress and results
- Lessons learned
- Recommendations for future campaigns

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The best practices are the ones that work for **you.**℠

Building Collective Knowledge on Targeted Outreach

Central Michigan University, Public Research University in Mount Pleasant, MI

Insight #1: Outreach Medium and Urgency Impact Student Responsiveness

Shift in Tone Improves Student Response Rate *Results from Three Most Successful Campaigns*
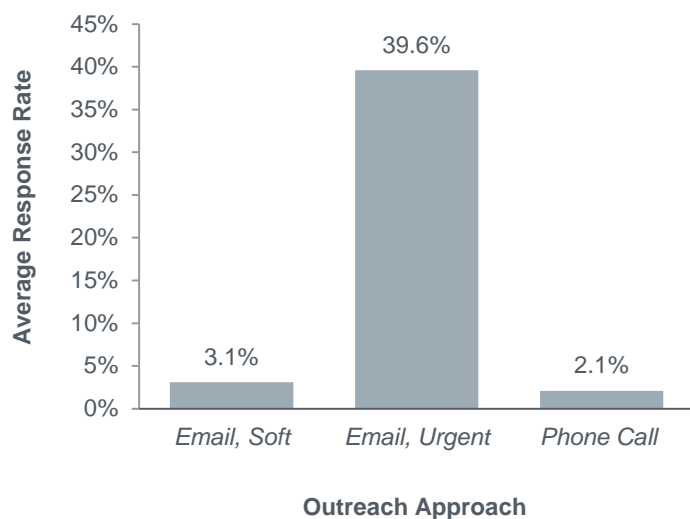
Three campaigns generated the highest number of in-person and phone advising meetings, enabling success coaches to meet with between 33 and 50 percent of their target populations.

In general, advisors struggled get students to respond to targeted outreach, the first step toward scheduling and completing an advising session. Advisors from the three successful campaigns all sent two "soft-approach" emails, one phone call/message, and one email with more urgent tone and content. Analysis of these advisor's portfolios revealed three insights:

- Phone numbers were difficult to accurately collect and phone messages elicited very few student responses

- Only 3.1 percent of students responded to a soft approach email

- Third emails, with stronger tone and more direct content , generated much higher response rates

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Insight #2: Successful Emails are Individualized, Urgent, and Actionable

Ineffective Emails

- ✖ Use vague subject lines (e.g. "Good Afternoon" or "Office of Student Success")

- ✖ Suggest resources, but no immediate action steps

- ✖ Reduce urgency by saying "If you would like to schedule a meeting…" or "I would be happy to help you with…"

- ✖ Bury critical information in lengthy exposition

Effective Emails

- ✔ Pique interest in the subject line (e.g. "Academic Concerns")

- ✔ Mention the student's major and missed requirements or thresholds

- ✔ Express explicit concern about progress, program admittance, or graduation

- ✔ Directly ask students to make appointments and provide deadlines

Sample Language

from Emails with High Response Rates

*"In order to continue in the College of Business and succeed at obtaining an Accounting major, the minimum requirement is a 2.5 GPA. I would like to meet to further discuss your goals and create action steps together to make this obtainable. Please call me by **March 28th** to schedule an appointment so I may assist you with necessary resources."*

*"I am increasingly concerned about your progression toward admittance to the program and graduation…I ask that you email me back by **this Friday (March 21)** with dates/times that we can set an appointment within the next two weeks."*

Guide: Campaign Implementation

How to Create and Run an Advising Appointment Campaign in SSC—Campus

The **appointment campaign functionality** is the backbone of targeted outreach in SSC—Campus. It allows users to identify a population of students and proactively encourage them to schedule appointments using custom appointment campaign scheduling links and a dashboard for tracking communication. Appointment campaign functionality in SSC—Campus automatically tracks and reports on which students in your targeted population have received communication, scheduled appointments, and completed those appointments, allowing for effective population health management and efficient follow-up.

1 Use the left-hand side bar to navigate to the Campaigns page, and then select 'Appointment Campaign' from the Actions table on the right side of the screen
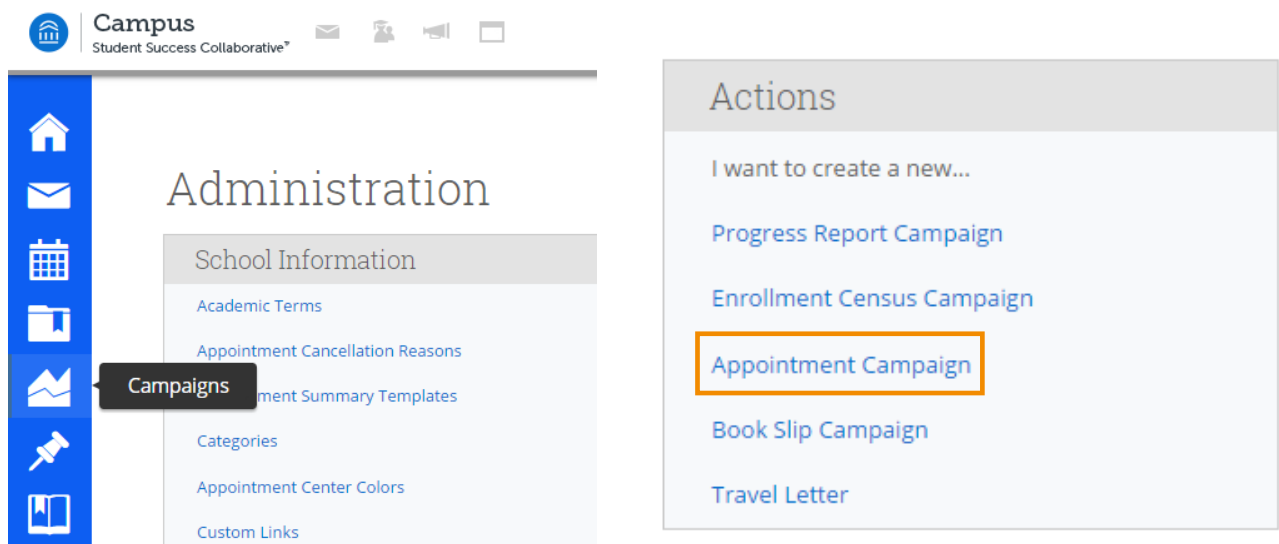
2 You will be prompted to define the campaign
Fill in each field to name and set the parameters and goals of your campaign

! Several field options are dependent on other selections you make. For example, the campaign type (advising or tutoring) will produce the options available for 'course or reason'.

How many appointments should the student schedule?

How many students can sign up for a time slot at one time?

What is the goal of the appointment?

Campaign Implementation Guide (CONTINUED)

3 Continue to the Add Students to Campaign page and use the advanced search to identify the students you want to receive the campaign outreach

Advanced Search

Saved Searches ▾

Keywords (First Name, Last Name, E-mail, Student ID)

Enrollment Status[?]
Enrolled ▾

Enrollment Term
Fall Semester 2016 ▾

Step 1: Select the correct enrollment status and term

Student Information First Name, Last Name, Student ID, Category, Tag, Gender, Race, Watch List

Area of Study College/School, Degree, Concentration, Major

Step 2: Select your filtering criteria

Performance Data GPA, Hours, Credits ▾

Fall Semester 2016 Data Classification, Section Tag, Term GPA ▾

Course Data Course, Section, Status ▾

Assigned To Advisor, Tutor, Coach ▾

Success Indicators Predicted Risk Level, Success Markers ▾

You can also choose to limit the search to only students that are assigned to you

Search   ☐ My Students Only   ☐ Include Inactive

Step 3: Click 'Search'

You have several options for choosing the right students to include in your campaign once you have selected the **enrollment status** and **term**:

- **Student Information** – Filter students by name, gender, race, or a pre-existing watch list
- **Area of Study** – Filter students by college, concentration, degree, or major
- **Performance Data** – Filter by min. or max. GPA or credits earned
- **Semester Data** – Filter by semester-specific data, such as term GPA or professor and section assignment
- **Course Data** – Filter by course
- **Assigned To** – Filter by advisor, tutor, coach, or team member assignment
- **Success Indicators** – Filter by predicted risk level or specific success markers

Example: Craft your targeted student population by filtering for students majoring in Biological Science with a GPA between 2.5 and 3.0 who have completed between 45 and 60 credits

Area of Study College/School, Degree, Concentration, Major

College/School (In Any of These)[?]
All

Concentration (In Any of These)[?]
All

Major (In Any of these)[?]
✕ Biological Science   ⊕

Performance Data GPA, Hours, Credits

Min. Cumulative GPA[?]
2.50

Max. Cumulative GPA[?]
3.00

Min. Credits Earned[?]
45

Max. Credits Earned[?]
60

Min. Hours Attempted[?]
0

Max. Hours Attem[?]
999

Campaign Implementation Guide (CONTINUED)

4 **Review the invite list and add students to your campaign**

Advanced Search ▼

Saved Searches ▾

| Standard User Type: student | Enrolled in Fall Semester 2016 | Majoring In: Biological Science | x |

← *Your applied filters appear here*

[Search] Modify Search

Check this box to import all students returned into your campaign roster

Actions ▾

☐ ALL	STUDENT NAME ▾	ID
☐	1 Aardema, Klarika	872005518
☐	2 Alberro, Athena	931143449
☐	3 Archut, Lynette	949097430
☐	4 Avery, Max	
☐	5 Bachtel, Nasira	
☐	6 Bamberg, Livvy	
☐	7 Bankowski, Spence	
☐	8 Banther, Cascata	

Review Students In Campaign

Actions ▾

Remove Selected Users

	NAME
☑	Aardema, Klarika
☑	Alberro, Athena
☑	Archut, Lynette
☑	Avery, Max
☐	Bachtel, Nasira
☐	Bamberg, Livvy

You can also use the Actions menu to remove selected students if you would like to exclude them from the campaign

5 **Add other advisors to your campaign**
You will automatically be affiliated with the campaign, but you may also have the option to select additional advisors to make them available for appointments.

Add Advisors To Campaign   ☐ Include Appointment Availabili

ID	NAME		AVAILABLE TIMES
☐	**LaToya White**		Mon-Fri 8:00am-5:00pm (Fall Semester 2016)
☐	**Gina Schorr**		Mon-Fri 8:00am-5:00pm (Fall Semester 2016)
			Mon-Fri 12:45pm-5:00pm
☐	**Emily Sentz**		Tue, Thu 3:00pm-5:00pm
☐	**Griha Singla**		Mon-Fri 8:00a_____
☐	**Maanie Hamzaee**		Mon-Fri 8:00am-

! Make sure that added advisors have set up their availability in the platform or students will not be able to schedule.

The best practices are the ones that work for **you**.℠

Campaign Implementation Guide (CONTINUED)

6 Compose the message you want students to receive

You have the flexibility to customize both the subject line and the messaging of your outreach or keep the automatically generated scripting.

Compose Your Message

Use Merge Tags like this to include each student's name in their message

{$student_first_name}, Schedule an Advising Appointment

B *I* | := := | co co | ← → | Format ▼

Please schedule your advising appointment.

Hello {$student_first_name}:

Your advisor requests that you schedule an appointment. To do so, please click the following link, select a time that works with your schedule, and click Save. You will receive an email confirming the appointment time and details.

{$schedule_link}

A link to schedule the appointment is directly embedded in the email the student receives

Thank you!

7 Confirm and Send!

The final step of the process allows you to review the parameters of your campaign, confirm the number of students included in the target population, and preview the message.

Biology Career Counseling Campaign

Confirm & Send

Campaign Type: Advising	**Start Date:** 12/14/2016	**End Date:** 12/28/2016
Reason: Career Counseling	**Appt Length:** 15 minutes	**Slots Per Time:** 1
Appt Location: Academic Success Center	**Appt Limit:** 1	**Reminders:** ☑ E-mail ☑ SMS

Subject {$student_first_name}, Schedule an Advising Appointment

Email Preview View   **Invitees:** View All (136)   **Included Advisors** View All (4)

< Back   Save and Exit   **Send**

Once you have sent out the campaign, you will be able to **track appointments made as a result of the campaign** at any time by revisiting the Campaigns page and selecting the 'Appointment Campaigns' tab.

Fall Semester 2016 Campaigns

Progress Report Campaigns | Enrollment Censuses | Appointment Campaigns | Book Slip Campaign | Travel Letters

☐ All Appointment Campaigns

NAME	STATS		
✉ **Biology Career Counseling Campaign** ADVISING 12/14/2016 - 01/31/2017	◔ Appts. Made (0%)	◔ Reports Created (0%)	◔ Attend. Rate (0%)